

## DOCTORAL THESIS

### **Amartya Sen's Capability Approach and Catholic Social Teaching in dialogue: an alliance for freedom and justice?**

Davies, Augusto Zampini

*Award date:*  
2014

*Awarding institution:*  
University of Roehampton

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**Amartya Sen's Capability Approach  
*and*  
Catholic Social Teaching  
in dialogue:  
an alliance for freedom and justice?**

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By

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*A thesis submitted in partial fulfilment of the requirements for the **degree of PhD***

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2014

## **Abstract:**

This thesis explores the connection between Amartya Sen's Capability Approach (CA) and Catholic Social Teaching (CST). It questions whether their economic and theological views can be methodologically and practically compatible, particularly around issues of *development as freedom* and *wellbeing as justice*. The thesis proposes a dialogue between CA and CST, framed by some parables of the New Testament, and argues that the fruit of such a dialogue can enhance human development and reduce injustices, especially in poor regions in Latin America.

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Word count (excludes Cover, Table of Contents, Acknowledgments, Appendices and Bibliography):  
94,959 (main text) + footnotes, figures and text boxes (23,133) = 118,092

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# Acknowledgements

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I would like to express my immense gratitude to all those who have made this dissertation possible. They are too many to mention, but are all included in the “we” which I use to express my arguments. In particular, I am extremely grateful to my Church in Argentina. First, to the people of my former communities, especially those living in poor neighbourhoods. They have been an immense source of inspiration, and are represented in the thesis through Araceli and Gustavo, two characters used to bring flesh to the academic discussion on human development and justice. Secondly, to my former and present Bishops, and my brother Priests, whose support has been crucial.

Also, I cannot but be extremely indebted to the Catholic Church of England and Wales, especially to the Sisters of the Society of the Sacred Heart, who have hosted me during most of the years of study in London, to CAFOD (Catholic Agency for Overseas Development), who have given me more opportunities to meet and help the most needy as a theologian, to some Catholic families who have provided immense emotional and material support, and to my present parish in Pimlico: Holy Apostles, whose members and Parish Priest have helped me to recover the love for the Kingdom of God.

Although it is not the custom to thank supervisors, I would like to show my appreciation to Séverine Deneulin, my former MA supervisor, and to Tina Beattie, especially for their friendship, which has been so important to me in many ways. And last, but not least, I ought to thank Mary Martin, my ‘adopted mother’ in England, for her generosity and patience while reviewing my drafts and correcting my English. Without all these people, this dissertation would not have been possible.





# Introduction

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This dissertation explores *why* and *how* economics and theology can be engaged in a fruitful dialogue from which creative ideas to transform present unjust situations can ensue. From the economic side, it is limited to the notion of ‘human-development’, as informed by Amartya Sen’s capability approach (CA). From the theological side, it addresses only the notion of ‘integral and authentic development’ (IAD), as informed by Catholic Social Thought<sup>1</sup> (CST).<sup>2</sup> Given that both CA and CST have universal aspirations, the dialogue proposed herein could refer and apply to any sort of unjust situations worldwide. However, this thesis is mainly focused on the reality of urban marginalisation in Latin America, where Catholicism is the predominant religion and where Sen’s economic approach has been widely accepted by policy-makers.

## (i) CST and economics

Why should CST seek for a dialogue with economics? First, because the development of all peoples ‘is an object of deep interest and concern to the Church’, particularly of those peoples ‘who are trying to escape the ravages of hunger, poverty, endemic disease and ignorance; of those who are seeking a larger share in the benefits of civilization and a more active improvement of their human qualities; and of those who are consciously striving for fuller growth’ (*Populorum Progressio*, 1967:1).<sup>3</sup> This will not happen without an economic system amenable to human progress. Although it is not the task of the Church to ideate such a system, it is her<sup>4</sup> responsibility to dialogue with economics so as to correct systems that hinder human growth, and promote systems that can truly serve humanity (*Octogesima Adveniens*, 1971:4; *Caritas in Veritate*, 2009:30-31).

Therefore, and second, the dialogue with economics turns out to be a crucial dimension of the Church’s prophetic mission in terms of development and justice. CST conceives human

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<sup>1</sup> We are not addressing debates about the distinction between Catholic Social Teaching and Catholic Social Thought. Although this topic is crucial for this area of theology, we assume that Social Thought includes, although transcends, the official documents of the Catholic Church on moral concerns. For more on this distinction see Verstraeten (2005). For the purpose of this thesis, CST will primarily refer to the official teaching of the Church.

<sup>2</sup> In order to avoid tedious repetitions, we will refer to the two interlocutors as CST for the theological side, and Sen or CA for the economic side.

<sup>3</sup> As customary in Catholic theology, official documents of the Church are referred to by paragraph numbers rather than by page numbers.

<sup>4</sup> We refer to the Church as feminine. Throughout the thesis to avoid sexist language, we use he (him-his) or she (her-hers) indiscriminately when referring to a single person. However, we have chosen a pattern based on Spanish, where ‘an individual’ is masculine and ‘a person’ is feminine.

development as a holistic or ‘integral’ process for the whole person and for all peoples (*Populorum Progressio*, 1967:14). Hence, any notion of development that is limited to economic growth or that sidelines the social, moral and spiritual dimension of human beings lacks actual ‘authenticity’.<sup>5</sup>

Since *Populorum Progressio* (1967), CST has furthered this idea of IAD through social and charitable movements (e.g. Caritas Internationalis),<sup>6</sup> theological analysis,<sup>7</sup> and Church documents.<sup>8</sup> From these contributions, it became apparent in CST that the bases of IAD are to be found in earliest Christian principles in which humans are regarded as beings created in the image and likeness of God and redeemed by Jesus Christ. However, in the current global public arena in which development-economic programmes are conceived (e.g. United Nations Development Programme –UNDP), or even in countries with a large majority of Catholic believers such as in Latin America, the notion of IAD seems to remain a part of Catholicism’s best kept secret (Henriot et al 2002). To unwrap it, CST needs to resume and deepen its ecumenical roots, particularly in the interaction with social sciences (Verstraeten 2005). A way of doing so is to respectfully dialogue with present economic theories. Hence, the search for interlocutors and allies in the promotion of economic growth and human flourishing, far from being an addendum to theology, is an inherent element of CST, and a pivotal one in order to deploy its prophetic mission in the world.

Moreover, if the mere accumulation of goods does not ultimately satisfy persons, it is therefore necessary to develop a *moral* understanding of economics (*Sollicitudo Rei Socialis* 1987). Hence Pope Francis (2013) has challenged the assumption that unimpeded growth leads us directly to human fulfilment. Although some argue that free trade and the present globalisation system have brought unprecedented material growth (Friedman 1999), it seems that such abundance is only partial (Sachs 2005, Stiglitz 2013). Indeed, as the Pope argues, this model of economic growth has impoverished the source of growth altogether, i.e. the earth and its natural environment on the one hand, and human cohesion -due to extreme inequality- on the other. For CST, therefore, if an economic model wants to foster actual freedom, then it needs to

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<sup>5</sup> “Integral human development”: for the whole person and for all peoples. “Authentic human development”: promotes all the dimensions of humanity without idolising one in particular. For a recent and clear article on IAD, see Dorr (2012).

<sup>6</sup> For this organisation’s work see <http://www.caritas.org> For how CST and its notion of development is put into action see <http://www.catholicsocialteaching.org.uk/>

<sup>7</sup> See, for example, the work of L. Sowle Cahill (2011; 2013), J. Ives Calvez (1987, 1990, 1994), Charles Curran (1972; 2002), Donald Dorr (1992), David Hollenbach (1979; 2002), Johan Verstraeten (2010), and George Weigel (1991 and 2003).

<sup>8</sup> E.g. *Sollicitudo Rei Socialis* (1987), *Centesimus Annus* (1991), *Caritas in Veritate* (2009).

do so in connection with justice, without which the wellbeing of peoples is seriously compromised.

In short, due to its interest in human growth, its prophetic mission regarding IAD, which comprises in particular the very poor, and its understanding of actual human progress and its relation to freedom and justice, CST is urged to find economic interlocutors with whom to discuss these issues.

## **(ii) Economics and theology**

Is there a valid interlocutor in the prevailing liberal development trend with whom to discuss and eventually share CST's view of IAD? We argue that there is, and that it can be found in the human development paradigm, reflected by the UNDP in its annual Human Development Reports, rooted mainly in the works of Amartya Sen and his CA (Deneulin 2013).

An important reason to select Sen as an interlocutor is his prophetic voice in modern liberal economics. His approach has:

- (a) enriched the understanding of development as a multidimensional process, basically due to its solid philosophical grounds (Deneulin 2009). Sen's neo-Kantian thinking is underpinned by Aristotle, Adam Smith and Karl Marx (Sánchez Garrido 2008), and also by Borda, Condorcet, and Kenneth Arrow with regard to the 'social choice theory' (Pettit 2010);
- (b) permitted the re-opening of the debates about economics and ethics, which were waning rapidly due to a deceptive technical interpretation of economic science (Putnam 2002 and Walsh 2003);
- (c) facilitated the interaction between human development, justice, human rights and human security, and promoted the analysis of the association between market, power and institutions (Sengupta 2009);
- (d) furthered a new way of approaching the tension between global trade and national sovereignty, between pluralistic cultures and identities and a worldwide uniform economic trade model (Morris 2010); and

- (e) notably influenced policies of international agencies such as the World Bank and United Nations,<sup>9</sup> as well as non-governmental organisations such as Oxfam (Daka 2008), poverty/progress research such as Oxford Poverty and Human Development Index<sup>10</sup> and Observatorio de la Deuda Social Argentina,<sup>11</sup> and has had wide acceptance among policy-makers, especially in Latin America (Flores-Crespo *et al* 2004).<sup>12</sup>

Moreover, as explained later in more detail, the CA conceives progress as a process of expanding people's real freedoms -their valuable capabilities<sup>13</sup>-, freedoms with which people can become active agents of an equitable development on a shared planet (Alkire 2002). Thus, the aim of economic growth -according to this paradigm- is to provide opportunities for people to reach their potential as human beings: to be educated, healthy and creative, to participate in the life of their communities, to be engaged in healthy relationships, etc. (Deneulin 2011). In general, the means by which these opportunities are given is through processes of public dialogue, which include but transcend democratic decision-making. For Sen, indeed, progress is hindered when people's values are not considered in the processes of social development.

If Sen is right, when promoting economic growth in regions and countries where a great majority claims to be religious, a dialogue with theology is paramount. This goes from the Buddhist Sri Lanka, to the Islamic Iran; from the Hindu India to the Confucian China; from the Jewish Israel to the multi-ritual Africa or the Christian Latin America. In other words, if economics wants to promote truly human development where freedom and justice are respected, then it needs an alliance with other disciplines that address the question of progress transcending utility functions, such as theology and its values underpinning the idea of growth.

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<sup>9</sup> The change from international indicators alone, to a more holistic way of addressing people's wellbeing is mainly due to Sen and to the Pakistan economist Mahbub ul Haq's influence. This is clearly evidenced with the creation of the United Nations Development Programme (UNDP) and its Human Development Report (HDR), published since 1990, which measure development according to the capacity of people to convert wealth into wellbeing (Human Development Index) (UNDP, 2013b). See Chapter 6.6.

<sup>10</sup> See <http://www.ophi.org.uk/>

<sup>11</sup> See <http://www.uca.edu.ar/index.php/site/index/es/uca/observatorio-de-la-deuda-social-argentina/>

<sup>12</sup> The influence of the CA in national policies transcends Latin America. For example, as Brighouse and Robeyns (2010:11) highlight, 'in Germany, the second and third national report on poverty and wealth took inspiration from the CA to analyse poverty and social exclusion (Deutscher Bundestag 2008). And in Great Britain, part of the scientific work done for the newly established Equality and Human Rights Commission builds on and extends the CA (Equalities Review 2007; Burchardt 2008)'.

<sup>13</sup> Sen uses the term capability in a particular technical manner. See Chapter 6.3.

### (iii) Dialogue between CST and CA: literature *status quo*

It comes as no surprise that, in the last two decades, researchers who work under the umbrella of human development have attempted to engage with theology. For instance, Taylor (1995) analyses how faith communities working ecumenically can forge more effective development programmes, and White and Tiongco (1997) compare programmes inspired by the secular paradigm and those fostered by the Christian ethos. Both works seem to aim at persuading religious communities that their beliefs are not incompatible with the human development paradigm. Heynes (2005), Tyndale (2006) and Belshaw *et al.* (2001) analyse how faith values influence development initiatives worldwide. Deneulin's *Religion in Development* (2009b) has made explicit links between Sen's CA and religious values in general, dedicating a special chapter to Christian faith where, she argues, CST plays an important role. However, unlike this dissertation, none of these studies aims at addressing development matters or economic issues theologically.

Some Christian theologians have responded to these attempts. Stephen Plant (2009) works on an Augustinian reading of development, linking it with the CA. Nicolas Sagovsky (2008), from an ecumenical theology of justice, analyses the notion of justice throughout the Patristic and Scholastic tradition and asks if Rawls and Sen can be good companions to develop further the Christian notion of justice in our present time.<sup>14</sup> Dana Bates (2013) delves deep into the relation between the CA and Trinitarian Orthodoxy, particularly through the notions of agency, solidarity and structures.

Until recently, there has been a lukewarm response from Catholic theologians to engaging with the CA. From a philosophical angle, Daka (2008) analyses controversial land reform in Zimbabwe through the lens of Sen's work. Although part of the analysis is also related to CST, implicitly suggesting the connections and the differences between the two paradigms, particularly regarding the anthropological notion of agency (Sen's notion being more individualistic, whereas CST's is more communitarian, according to the author), Daka's investigation does not explicitly address potential theological links, nor does it explore the contributions that such links might have for either Sen's approach or for CST.<sup>15</sup>

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<sup>14</sup> Unlike Sagovsky's, this research will not be focused in terms of a historical analysis of the understanding of justice for Christianity, but rather on a dialogical exercise between two specific paradigms. Unlike both Sagovsky and Plant, the research will be restricted to a specifically Catholic tradition: CST.

<sup>15</sup> Unlike Daka's, our research is not framed around a specific case, such as Zimbabwe's land reform, but rather illustrates, mainly with Latin American examples, how the notions of freedom/development and wellbeing/justice, key for the present global policies, can be enriched through a dialogue with Sen and CST.

It is only in the present decade that new research has come to light in terms of explicitly connecting CST with CA. Filice (2013), for example, explores the link between the CA and the principles of CST as informed by papal encyclicals. She argues that CST's principles of solidarity and the common good, when connected to the CA's notion of agency and participation, can protect Sen's approach from its potential to lean towards individualism and can ignite the recognition of human dignity in the economic development field.<sup>16</sup>

To complement these Christian theological responses, this thesis argues that for both the CA and CST, the notion of *development* is inextricably linked with the notion of *freedom*. Also, both agree that the aim of development and freedom should be *human wellbeing*, for which *justice* needs to be forged in social relations. In other words, actual wellbeing in a given society is only feasible when processes for redressing injustices and fostering justice are taking place. Therefore, these core four concepts (actually two twofold ideas): *development as freedom* and *wellbeing as justice*, are taken herein to delimit the dialogue between CST and CA.

By critically linking CST and CA, this research aims to contribute to the potential of Catholic theology and liberal economics for promoting justice and redressing injustices through concrete development policies and programmes, for the benefit of people's wellbeing, particularly the most needy in regions such as in Latin America, where, as said before, Catholicism is the predominant religion and where Sen's economic approach has had wide acceptance with policy-makers.

#### (iv) Structure

These are our reasons for selecting Sen's approach as an interlocutor with CST. The scientific feasibility of this dialogue is analysed in Part I. Part II offers an in-depth study of Sen's CA in order to discover commonalities and dissimilarities with CST. Part-III explores a framework for the dialogue based on some parables of the Kingdom of God as revealed in the New-Testament. Not only are these parables pivotal for CST, but they also deal with recurrent human conundrums linked to economic relations. Economists such as Sen have used their inspiring stories to

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<sup>16</sup> Unlike Filice's, our research does not focus on certain principles of CST with which to connect theology with CA. Rather, it is focused on the notion of human development and its two main ideas: (i) that development is about peoples' freedom; and (ii) that actual wellbeing is only feasible when injustices, particularly those generated by development processes, are being seriously tackled. Moreover, instead of exploring CST principles, this research is based on the Biblical stories of liberation and freedom connected with economics, which we argue are the basis of CST principles. For a good account of CST principles, see also Bolieu (1994).

challenge mainstream ideas on market and justice,<sup>17</sup> reinforcing our proposed conversation. Indeed, the aim of this parable-framework is to foster a fruitful dialogue within which freedom (human development) and justice (human relational wellbeing) can be promoted in current development programmes.

The three Parts are preceded by a picture which introduces and helps to structure the chapters and sections, thus aiding the proposed dialogue between CST and CA. As the Pontifical Council for Culture (2006) argues, *The Via Pulchritudinis (The Way of Beauty)* seems to be a privileged route to facilitate dialogue with those who have difficulties with the Church's teaching, because it can help the interlocutors to go beyond ideologies that instrumentalise *the truth* or restrict *the good* to merely positive social actions. Thus, art can assist CST and CA to debate around 'development/freedom' and 'wellbeing/justice', without getting trapped in fruitless arguments about religions which disregard reason, nor muddying the waters concerning economic theories exclusively limited to material utilities. Because an 'unreasonable' religion instrumentalises the truth for the cause of a particular creed, and a 'solely materialistic' economics belittles other aspects of human wellbeing, the CST-CA deliberation necessitates commencing the dialogue for the promotion of freedom and justice by circumventing such ideologies. Art, we argue, opens the possibility of doing so .

Moreover, we believe, alongside Pieris (2013), that the art of doing theology is not necessarily an instrument with which we can find a static truth. Rather, it is a process where, according to the Judeo-Christian tradition, we re-interpret what has been revealed by God in primordial experiences of liberation (e.g. of the People of Israel liberated from their oppressive enemies; or humanity liberated from all oppression, sin and even from death through Christ's Passover), as well as the respective interpretations exemplified by collective communitarian "memorials" throughout the centuries. In this task of theologising and re-interpreting, art has been consistently productive, prolific and, occasionally, even more effective than traditional theologies (Duffy 2013). Hence, by complementing the logic of Christian theology with an artistic perspective, the re-interpretation of the primordial experience of freedom gathers momentum, creativity and joy. In this case, it enhances the capacity of CST to creatively dialogue with economics, positioning it as a counterpart in a conversation open to a dialogical truth, as opposed to an attempt to adhere to a dogmatism closed to any idea outside its own fixed beliefs.

Furthermore, this artistic approach resonates with Sen's style. In his *Idea of Justice* (2009), he introduces every chapter with a story rather than with a philosophical statement. By doing so,

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<sup>17</sup> For more on Sen's use of religious narratives, see Chapters 5.1; 7.1; 9.1–9.3.



he opens his idea of justice to people with different backgrounds and beliefs, people who can get into the stories or bring new ones and, from there, start the conversation. Introducing each Part of this thesis with paintings is one way of responding to Sen's invitation. A second way of responding artistically to Sen's invitation is to illustrate our arguments throughout the whole thesis with examples from the life of Araceli and Gustavo, a couple living in a shanty-town in Greater Buenos Aires, Argentina. Although invented characters, their life-situations are taken from real examples of actual people I met while living in one of those slums some years ago. Analogous realities can be confirmed by empirical research, such as Mitchel (2012). The intention of including Araceli and Gustavo's stories is threefold: (i) being consistent with the bottom-up approach upheld by both CST and CA;<sup>18</sup> (ii) to give flesh/body to the theoretical discussion; and (iii) to provide a more focused approach to the dialogue, i.e. limiting its scope to the reality of poor people in Latin America, more precisely in Argentina, where the majority of the population is still Catholic.<sup>19</sup> Finally, a third way of responding to Sen with a theologically artistic approach, is to frame the dialogue according to stories or parables from the NT. As will be argued later,<sup>20</sup> these parables are one of the most refined expressions of Christian art, thus enabling a promising dialogue with other sciences, such as economics. In short, this thesis attempts to present a dialogue between CST and CA on freedom and justice. This dialogue, apart from enriching both interlocutors, can generate novel ideas to improve human development and people's wellbeing.

## (v) Content

Framed by *The Boxers*, a painting by the Chilean artist Matta-Echauren, Part I gives an account of both CST and CA methodologies. It argues that, although CST and CA can be viewed as being boxing opponents, a closer examination of both approaches shows the opposite. Through a proper dialogue, they may become argumentative friends who can ideate new visions of development/freedom and wellbeing/justice.

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<sup>18</sup> As explained later in Part I, for CST, if we are to pursue 'social-integral' progress, the starting point should not only be the actual reality of individuals and society, but also and mainly *the actual poor*, the reality, normally unseen, of those usually excluded from different social systems and who suffer from isolation (Pope Benedict XVI 2009). By starting from the least, it is possible to reach the most, meaning that the whole society and not just a part of it will be able to develop, something still wanting in international liberal economics (Pope Francis 2013). Similarly, for Sen (2009), those who are at the bottom of the economic pyramid are the ones who suffer severe restrictions in their positive freedom. Development programmes should start with them by helping to increase their capabilities (see Part II for a further explanation on the CA and its starting point to foster justice).

<sup>19</sup> Martha Nussbaum (2000) does something similar. She takes the example of two Indian women to explain her theory on development and gender.

<sup>20</sup> See Chapter 3.2.3 and Chapter 9.

In order to investigate CST's methodology, Chapter 1 starts by addressing the question of why a theology based on God's revelation (Scripture and Tradition) is not closed to dialoguing with social sciences in general, and with the CA in particular. Chapter 2 delves deep into the three steps of CST methodology: seeing-judging-acting. Given that it is a contested method, the chapter offers a novel historical explanation of the adoption of such a method by the Catholic tradition, illustrating how the method, occasionally resisted inside the Church, has persisted due to its deep biblical roots. More specifically, the chapter expounds on the role of the parable of *The Good Samaritan* (Lk 10:25-37) as a key text for the adoption of the method. Chapter 3 studies the objections to the method and argues that, regardless of its limitations, it is a valid theological approach to propose a dialogue with economics, especially due to its essentially open or ecumenical approach to the 'seeing' (analysis) of social realities. For example, in order to see economic inequality, CST needs economic partners, such as the CA. Moreover, because it is a method that goes beyond theological arguments, seeking social transformation (action), an inter-disciplinary approach is inevitable. Yet, extra space is given to discuss the more controversial part of the method: the 'judging' in the light of the Gospel. We question if the Bible can be related with social analysis, or if it has any relevance to present economic situations, or if it can be proposed as a valid theological instrument for interaction with secular sciences. After arguing for a favourable response, Chapter 4 moves towards the economic interlocutor. First, the chapter provides a brief analysis of the evolution of methodologies in modern economics, demonstrating how it can be open to an interaction with other sciences, especially with theology. The chapter then analyses Sen's vision of economics, which helps to confirm the feasibility (and necessity) of an inter-disciplinary economic methodology. Indeed, as Sen argues, economics is about free choices and about the production of wealth. Hence, economics necessarily questions how to integrate wealth with human choices, always underpinned by human values. Given that there is no reason for excluding religious values in such an equation, the chapter concludes that, at least from a methodological perspective, CA and CST are compatible.

Part II is introduced through an Indian mural from the 3<sup>rd</sup> century B.C., which depicts the importance of dialogical participatory processes for the promotion of human-development in the history of India, a dialogue in which religious views are incorporated. As the mural traces the human development-religion connection back to ancient history, particularly through the mission of the emperor Ashoka and Buddhist monks, Chapter 5 analyses Sen's ideas and mission within economics in a chronological way, something unusual in the vast bibliography on Sen. It is argued that Sen's openness to diverse views, his understanding of secularism and religion as feasible partners, and his strong desire for justice can be found in his childhood formation. The evolution

of Sen's approach is clarified through his main contributions in different decades; from his innovating welfare analysis in the 1970s, through his CA in the 1980-90s, to his *Idea of Justice* in the 2000s. Given the centrality of the CA in Sen's proposal, Chapter 6 studies such an approach in depth, analysing its most significant critics, its influence in present international development programmes, and highlighting its pivotal aspects of freedom and wellbeing. If, as Sen argues, wellbeing can be improved through the expansion of freedoms, which are necessarily deployed in a social context among competing values, the promotion of such an approach cannot but explore an *idea of justice*. Consequently, Chapter 7 considers crucial aspects of Sen's *idea of justice* (2009, 'hereinafter TIJ'). By examining how TIJ can operate in practice, particularly in the case of food insecurity in Argentina, the chapter discovers and explains some caveats connected with three pivotal aspects of TIJ: relational-democratic (communicative process and entitlement), practical (cause of injustices, especially the structural ones) and agent-centred (interdependency and the *telos* of injustice), and argues that CST is one, among other possible partners, that can help CA/TIJ overcome such caveats. However, in order to foster an eventual CA-CST partnership, particularly for the promotion of development/freedom and wellbeing/justice, both approaches need to know which topics are rivals and which are potential collaborative partners, something synthesised in Chapter 8 and expanded in the last part of the thesis.

With the guidance of a painting by the Argentine-Spanish Luis Seoane about dialogue and joy, Part III introduces a dialogue between CST and CA. The idea is that, based upon some similarities, yet enriched with dissimilarities, both interlocutors can discuss development/freedom and wellbeing/justice in a fruitful manner. The discussion is not set up in a dialectical way, but rather in a dialogical one, using the framework of the parables of the New Testament, particularly those with an economic content. Chapter 9 contends that the parables are a valid theological vehicle to counter-argue prevailing utilitarian narratives widespread in present economics, a common enemy for CST and CA. In addition, a thorough explanation is given on why the parables of the Kingdom of God can be an appropriate framework for a non-exclusive religious discussion. In particular, the Chapter analyses the surprising anthropological and socio-economic connection between the parables and the CA, and argues that the parables are not only the basis of CST, but also its future. More importantly, and considering the lack of creative incentives for actual social transformation in present economics, the parables provides inspirational and thought-provoking stories, which, due to their deep anthropological-relational root, can inspire novel thinking and acting regarding development/freedom and wellbeing/justice. Still, as inspirational as the parables may be, no economic reform is possible without a serious economic approach. Therefore, the Chapter claims that the combination of CST

(which is rooted in the parables in this thesis) with the CA, is what actually fuels the possibility for social transformation.

After indicating the method of selecting and explaining the parables, Chapter 10 analyses the *Parable of The Sower* (Mk 4:1-20), which contains a fundamental theological notion of the Kingdom of God (as the basis of CST). It is asked whether this theological basis is open to other 'terrains' or reigns, e.g. secular economics. As suggested by the parable, because the Kingdom of God offers a relational anthropological view that arguably resonates with the CA, it provides a narrative context within which CST and CA can develop their dialogue. More specifically, the Chapter argues that CST and CA can be mutually enriched through the analysis of essential relationality depicted in the story of *The Sower*, meshed with the CA understanding of free agency and processes of participation. This mutual enrichment, as the Chapter concludes, can foster creative and novel development policies as an alternative to the prevailing utilitarian ones, and can help in promoting a culture of relationships in economics that permits actual human flourishing.

Once the basis of CST and the CA -and their respective ideas of human development- has been set up through the frame of *The Sower*, Chapter 11 studies the parable of *The Unmerciful Servant* (Mt 18:23-35) in order to enhance the dialogue around development/freedom. The parable permits one to expound on topics of relational anthropology (as described in the previous chapter), and triggers the discussion on gratuitous behaviour within economic transactions. Although liberal economists have attempted to approach this subject through the theory of 'economics of altruism', such theory falls short in addressing the essential relationality underpinning gratuitous behaviour, and therefore cannot escape from a utilitarian view of economic bonds. Conversely, it is argued that a CST-CA combination, based on the message of the parable, is equipped to offer an alternative explanation from which other programmes can ensue. In order to support this argument, the Chapter relies on the research of the economist Stefano Zamagni on 'the logic of the gift as reciprocity', which has not only influenced the CST encyclical *Caritas in Veritate* (2009), but is also aligned to the CA regarding the need to give account of altruistic (or gratuitous) behaviour in the market beyond the arch-narrative of the 'utility-maximiser' *homo oeconomicus*. The Chapter concludes that, when the logic of the gift is combined with the CA, there is scope for a fruitful dialogue about the importance of relational bonds in business, about the enhancement of agents' actual positive freedom, and about a relational understanding of justice in economics. This latter topic is merely mentioned, because it is addressed in the following chapter.

Chapter 12 analyses the parable of *The Workers in the Vineyard* (Mt 20:1-16) and explores some connections between CST and the CA on wellbeing/justice. In particular, the chapter studies the idea of justice as relational –common to both CST and CA- and asks how it can be widened through the logic of the gift. Weaving CST and CA ideas on injustice and inequality, and encouraged by the parable, the chapter questions the possibility of shifting the criteria to judge what is good (or just) from a mere proportional-retributive justice, predominant in economics, towards a broader and inclusive criteria. A comparative approach in economic relations is inevitable and necessary, as the parable and the CA maintain. However, when comparisons rely merely on retributive justice, they prove detrimental to wellbeing. Indeed, as it is argued, through a strict merit-reward understanding of justice, especially in a free market economy, the advantaged members of a society are better equipped to multiply their wealth than the disadvantaged. This increases inequality, thus undermining development/freedom and wellbeing/justice. Therefore, a criterion for comparison that goes beyond resources and a retributive logic is crucial. This criterion is provided by the CA, for which what matters is a comparison (and equality) of capabilities or freedoms, not just of resources or assets. Still, even such a nuanced and flexible approach to equality often encounters strong resistance from the privileged, something the CA is shy of addressing. Hence, and following the parable, but still grounded in the CA proposal, CST brings into the discussion the intriguing aspiration of being-having ‘more than’ others, even when what one *is* or *has* suffices to live well, which contrasts with the aspiration of developing to the full according to one’s capabilities. The logic of the gift is then proposed as a path to instil a shift not only in criteria to judge what is good/just, but also in the attitudes towards the enhancement of the wellbeing of the most vulnerable, i.e. from an angry resistance to a joyful acceptance.

Whether the CA and CST accept, in the real world, the imaginative dialogue proposed herein, remains to be seen. What Chapter 10 argues is that if they do agree in discussing in these terms issues of freedom, justice and inequality, they can provide an alternative to the prevailing and limited narratives on strict retributive justice, for which there are deserving and undeserving poor (still unfree people), alongside rich and free people. Some may argue that this dialogical proposal is a timid approach to the grievous injustices and increasing inequality worldwide. Yet this dialogue can have a real impact on the transformation of people and societies. In the end, for CST, the seed of the Kingdom of God, as described in the parables, although it can help improve social systems and personal attitudes, does not generate a mechanism with which absolute justice is achieved. Rather, as the Chapter concludes, the way God’s grace operates in this Kingdom is through the mediation of goodness, gratuitousness and excess in social bonds -

economic ones included. Nevertheless, these mediations in the socio-economic arena are frequently more challenging, perturbing and effective than any other socio-economic revolution. The CST-CA alliance, we argue, can be an agent of this mediation.

## **(vi) Limitations**

By no means do we attempt a synthesis of CST, or the CA, or the link between both. Rather, ours is an exploration of a path that has not been navigated by the Catholic theological tradition nor by the CA literature. Although the imaginative dialogue proposed relies on thorough research and multiple conversations with economists akin to the CA, for a profound interdisciplinary approach, authors of both disciplines need to participate in the debate and in the writing. Their conversation need not be limited to the topics we suggest. In fact, this study is merely a beginning. More dialogues between CST and CA on topics around freedom/development and wellbeing/justice are needed. For example, as explained in Part II and III, a deeper analysis is needed of the development of economic agency (both personal and institutional) and its link with virtue ethics and the common good, or of the role of culture as the root of human growth and the tension existing between an emerging global culture and ancient local ones. Moreover, a broader discussion is required on the processes of public dialogue and participation transcending ordinary democratic channels, particularly regarding issues of trade-off of power, and on faith values in a secular public arena. Furthermore, both interlocutors would need to debate their different understandings of development, 'the good' and justice, especially due to their diverse philosophical positions: a teleological (CST) and a consequentialist (CA).<sup>21</sup> Also, they would need to confer on gender and environmental justice, the former clearly present in CA and the latter in both CA-CST.

Regardless of its limitations, more of which are mentioned throughout the thesis, our hope is that this research might serve as a basis for the promotion of further discussion between CST and CA. We are convinced that this dialogue has the potential to counter the prevailing utilitarian view on development/freedom and wellbeing/justice, and could hence help to promote a more inclusive understanding of wellbeing, especially in those regions where the majority hold Catholic values and where the CA is politically and economically well accepted, as it is in some Latin American countries.

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<sup>21</sup> This is of particular importance, because, as Part III points out, CST would be forced to provide reasons for conceiving God as the source of justice and growth, and the CA needs to provide reasons for omitting the analysis of preconceptions of 'the good' and 'the just' in free agents debating publicly on development.



# Part I: CST and CA Methodology

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## Introduction: *The Boxers*

Roberto A.S. Matta Echaurren (1911-2002) was one of the most famous Chilean artists. Contemporary and friend of Salvador Dalí and André Breton, he distanced himself from the surrealist movement by becoming more interested in social issues occurring in developing countries, hence moving from a European culturally-oriented expression towards a more 'Southern' one.<sup>23</sup> In the above painting, the aggressive movements of the boxers' punches ended

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<sup>22</sup> Picture 1: Matta, R., *Los Boxeadores* (1955). Galería Araucaria de Chile (hereinafter '*The Boxers*')

<sup>23</sup> For an academic account of the impact of his art, see Fletcher, V.J. (1992). For an overview of his numerous paintings, see <http://www.matta-art.com/>. For a brief bibliography –in Spanish–, see [http://www.wallpapers.cl/pintores/biografia\\_roberto\\_matta.php](http://www.wallpapers.cl/pintores/biografia_roberto_matta.php). *The Boxers*, painted after World War II, reflects on the one hand the violence underpinning social conflicts, and on the other hand the popularity of boxing as a sport during the late 1950s (boxing was the first sport to be broadcast live in many Latin-American countries). But behind the figures, the fading of colours, alongside the luminous exploitation of the brush-stroke that serves as a background, suggest a surrealist and indefinite scene. This is proper to the post WWII era, when economic development was the key social issue in most of policy agendas, although there was a great uncertainty about how to achieve it. By utilising a visual vocabulary that corresponded to his social context, Matta depicted human



up creating a harmonic view, emulating a form of embrace between the contenders. This means that one can see the dynamism of the painting either as a hostile boxing match or as a friendly hug, as repulsive violence or as an attractive argument.

Amartya Sen's CA and CST can also be seen as boxing opponents trying to knock down a rival, or as argumentative friends who can generate something that transcends their own views, namely appropriate development policies to reduce poverty and enhance people's wellbeing. This Part I depicts some of the most striking and hostile opposition to applying CST to the current socio-economic discussion. Arguments and counter-arguments are intended to create a dynamic view with which the reader can eventually make out the actual embrace between CST and CA. Although confused, the relationship between the two paradigms could be inferred from the painting and would generate a novel appraisal of social reality that each paradigm alone is not able to offer.

To further the analogy, let us take the relationship between Araceli and Gustavo, a couple living in a shanty town in Greater Buenos Aires.<sup>24</sup> Gustavo, a Peruvian immigrant, is a hard worker and obedient employee, has had a decent primary education, is slightly sceptical of religion and has sexist tendencies. Araceli, conversely, is a local Argentinean who combines a rebellious tendency towards any sort of formal authority with an enormously acute sense of justice (or injustice). She is less disciplined than Gustavo, has had a poorer educational basis, and is a devout Catholic and a catechist at her local parish. Due to their different backgrounds, Araceli and Gustavo disagree on many substantial issues, such as the relationship they should have with their respective bosses at work, the roles they should have at home, the education their children should receive, etc. Despite their discussions, arguments and disputes, they have managed to remain together for more than fifteen years, fostering something beyond their individualities, thoughts and points of view. In their interaction, though frequently aggressive, they have generated what they call a family. It is worth clarifying that theirs cannot be labelled as a conventional family, since they are neither civilly nor religiously married and both have children from previous relationships. Gustavo's disabled daughter, to whom he sends a substantial proportion of his income each month, lives in Peru. Araceli had her first son when she was in her early teens, the father of whom has never been around. Her second son was the fruit of a previous relationship which she had to end due to her former partner's extreme violence. Araceli

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conflicts from different perspectives: either violent, destructive and confrontational (boxers fighting), or as part of a harmonic view upon which reconciliation follows (background scene). (Source: ArtNexus, Available from: [http://www.artnexus.com/PressReleases\\_View.aspx?DocumentID=24926&lan=es&x=1](http://www.artnexus.com/PressReleases_View.aspx?DocumentID=24926&lan=es&x=1)).

<sup>24</sup> The example is taken from real people, although their names have been changed. This kind of relationship is common in those Latin American neighbourhoods.

was able to raise her children alone before she met Gustavo, with whom she has had three more children. All of them live together in their small house.

Araceli and Gustavo's lives could well reflect Matta's painting. Their daily struggles to live in an adverse environment can easily be described as a 'fight'. Due to their strong personalities and different backgrounds, their relationship can be seen as a boxing match. As any boxing match aims at producing something for others and not just for the boxers, so this couple aims at transcending their relationship and offering something to others, namely their children, their church and their neighbourhood. In addition, as in any boxing match in which the boxers devote all their energy and time to preparing themselves to be fit for the match, so this couple devotes a great amount of their energy and time in order to be fit for their relationship and family. Disputes or strikes aside, they generate a harmonic and dynamic picture that might be contemplated as engendering beauty, as is the case with the painting *The Boxers*. However, as the painter needs to follow certain rules to produce beauty, and as the boxers need to follow the rules of the game so as to generate a good show, Araceli and Gustavo, as a couple, also need to follow certain rules so as to enhance unity in a slightly aggressive relationship. Likewise, if the interaction between CST and CA is to display a new beauty (e.g. appropriate and effective public policies to reduce poverty), some rules are needed. To find and articulate those rules is the purpose of this Part I, where we analyse the compatibility of methodologies.

Given that this theological research aims at connecting the Catholic notion of IAD with the economic notion of the CA, its methodology ought to be aligned with the Catholic prescriptions for theological research on the one hand, while being compatible with socio-economic analysis on the other. Yet, methodology in Catholic studies is neither simple nor uniform. There are different branches of theology that require diverse approaches,<sup>25</sup> such as dogmatic theology and moral theology (Curran 1985). Generally speaking, while the first one tends to be deductive, the latter is more inductive. Moreover, within Catholic theological branches, methodology also varies, as is the case with Biblical studies, where the analysis of the text can be grounded in

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<sup>25</sup> Fundamental theology (reason, revelation, the authority of Scripture, hermeneutics), systematic theology (the nature of God, anthropology, the Church), pastoral theology (liturgy, religious education), canon law (positive norms of the Church) and moral theology have all their own methodological nuances. David Tracy (1981:54-59) groups theological disciplines into 'fundamental', 'systematic' and 'practical'. Within theological ethics, Keenan (2002) distinguishes responsibility ethics, personalistic ethics, an ethics of care, feminist ethics, natural law ethics, and social ethics (political-economy), and explains that most of these ethical approaches overlap with one another in their concerns, scope, and particular method.

narrative or sociological approaches, to mention just two examples.<sup>26</sup> Still, there is a common base in methodology for Catholic studies: theology depends on God's revelation.

Therefore, Chapter 1 firstly explains what this revelation-dependence means for Catholic studies in general and how it affects this research in particular. Secondly, considering that the specific topic under analysis belongs to social theological ethics, Chapter 2 analyses the particular method for this branch of theology. It will be demonstrated how the triple methodological movement of seeing-judging-acting, officially adopted by the Church during the last century, is well informed by biblical passages and aligned with Catholic tradition. Chapter 3 argues why this methodology, despite its limitations, is able to enhance a dialogue between CST and other social sciences such as economics. Finally, given that economics' methodology has its own epistemological difficulties and variations, as does theology, Chapter 4 questions whether present economics is open to dialogue with social sciences. After providing evidence for a positive response, Sen's understanding of economics is briefly discussed. The chapter concludes by affirming that Sen's economic approach and method is, *prima facie*, compatible with CST. Further analysis of this compatibility and dialogical relation will come in Part II.

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<sup>26</sup> For different methodological approaches in Biblical studies (e.g. historical, literary, psychological, sociological, theological, spiritual), see Schneiders (1991:114-121). For a comprehensive analysis of different methods to interpret the Bible according to Catholic theology, see Pontifical Bible Commission (1994). For an original methodology to read the Bible based on Asian Liberation Theology and inter-faith dialogue with Buddhism, see Pieris (2013).

## 1. Scripture & Tradition

The Dogmatic Constitution on Divine Revelation issued by the Second Vatican Council (Vatican II) in 1965: *Dei Verbum (DV)*, clarifies the methodology Catholic theological studies shall follow. Any theological reflection shall be first and foremost based on listening to the true revelation of God. It is impossible to speak about God (doing theology: *theo*=God; *logos*=verb) without having spoken with God; or better, it is impossible to express and discuss what God says without listening to what he has revealed. For *DV*, this revelation is first and foremost expressed through the Sacred Scriptures and the Sacred Tradition (*DV*, 8-9).

The Sacred Scriptures are considered the Word of God, a preferential way in which God speaks. Despite the fact that God in his graciousness has spoken 'in many and varied ways', especially through the prophets whose messages are recorded in the Old Testament, *DV* explains that "now at last in these days God has spoken to us in His Son", Jesus Christ (Heb. 1:1-2), who has perfected God's revelation and salvation to all humans (*DV*, 4; cf Jn 1:1-18; 3:34; 5:36; and 17:4). Through Christ, 'God chose to show forth and communicate Himself and the eternal decisions of His will regarding the salvation of men' (*DV*, 6).<sup>27</sup> Although Christ had revealed this by his deeds and sayings in general, and through his death and resurrection in particular, he has seen fit to select a group of people to spread the good news (Gospel) of God's salvation to the whole world (*DV*, 7). This group of people is the Church, led by the apostles and their successors, i.e. the Pope as successor of Peter -head of the apostles- and the collegiate of bishops as successors of the rest of the apostles. Their task is to communicate God's salvation to all nations and generations (*DV*, 2).

The first Apostles, therefore, prompted by the Holy Spirit of the Risen Christ, handed on to the next generation what they had received from the lips of Christ and what they had learned from living with him (*DV*, 2). This commission was possible due to the help of other Apostles and apostolic men who, under the inspiration of the same Holy Spirit, committed the message of salvation to writing, i.e. the holy scriptures of the New Testament (*DV*, 2). Both the authors of the Old Testament and the New Testament have put into human words divine mysteries, so as to enable men and women to know -through the light of human reason- the reality of God's revelation (*DV*, 6; cf. Rm 1:20). Nonetheless, given that this Revelation is not a static affirmation of some rational truths, but rather a dynamic and relational reality between historic humans and their struggles, and The Eternal Divine and his liberational love, God has chosen some people to decide on the contested interpretations of the Scriptures and keep the Gospel alive throughout

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<sup>27</sup> CST (or theological) texts are reproduced without adaptation of gender-inclusive language.

history and cultures. These are the Apostles and their successors, empowered by the Holy Spirit at Pentecost and at their ordination respectively.<sup>28</sup> This is what is normally known as Sacred Tradition (*DV*, 10).

Although keeping the Sacred Tradition alive is actually performed by the whole church when celebrating, practising and professing in unity the love of God, contested issues on how to interpret the holy tradition always arise. For this reason, *DV* explains, the Apostles -the hierarchy of the Church- have the responsibility, as shepherds of the flock, to hold fast to the deposit of Revelation and keep the Church-flock united while it follows Jesus and listens to his word. This means that they have to decide and teach which interpretation of the Scriptures and Tradition can be officially considered as part of the continuing revelation of God and which not. This teaching, as *DV* clarifies,

is not above the word of God, but serves it, teaching only what has been handed on, listening to it devoutly, guarding it scrupulously and explaining it faithfully in accord with a divine commission and with the help of the Holy Spirit, [drawing] from this one deposit of faith everything which it presents for belief as divinely revealed' (*DV*, 9).

Still, if this teaching is to be part of the authentic tradition, it cannot be restricted to the pronouncements of the hierarchy, but the way their sayings are received by laity must be equally considered (Congar 2004). In fact, *tradere* in Latin means to deliver something to somebody, who needs to receive it and accept it (Latourelle 1966). When the faithful freely receive and accept in conscience the Gospel and the teachings of the Apostles, then the soul of the Tradition is embodied through the Evangelical values that people bring to light in their own concrete circumstances and cultures, something normally known as *receptio*, which is part of the *sensus fidelium*.<sup>29</sup> In the fourth chapter on the Laity, the Dogmatic Constitution on the Church of Vatican II, *Lumen Gentium* (*LG*), expresses it clearly:

Christ, the great Prophet, who proclaimed the Kingdom of His Father both by the testimony of His life and the power of His words continually fulfils His prophetic office until the complete manifestation of glory. He does this not only through the hierarchy who teach in His name and with His authority, but also through the laity whom He made His witnesses and to whom He gave understanding of the faith (*sensu*

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<sup>28</sup> For more on this see Congar (1966), Ratzinger (1966) and Witherup (2006).

<sup>29</sup> For a comprehensive systematic study of *sensus fidelium* and its relation to the Church's reception of revelation, see Rush (2009). For a historical summary of the *sensus fidelium* see: Kerkhofs (2003). For a more complete analysis of the meaning of the term, see Finucane (1996). For a criticism of the use of *sensus fidelium* in the Church based on the theology of John H. Newman, see Kirk (2010). For a positive account of the reception of *sensus fidelium* after Vatican II, particularly in systematic and ecumenical theology, see Mushy (2010).

*fidei*<sup>30</sup> and an attractiveness in speech... so that the power of the Gospel might shine forth in their daily social and family life (LG, 35).

What is more, in many Eastern Churches, statements from Councils are only considered part of the Holy Tradition- when they are received by the faithful (Kerkhofs 2003). Moreover, as Yves Congar (2004) has noted, even in the West, the history of Councils has proved that reception fluctuates throughout time. Sometimes a Church's teaching is initially received, but after a while such reception declines, for which reason a new Council often resumes the issue. All this should not scandalise people of faith but rather reassure them in their beliefs, particularly regarding the living Tradition, because the dynamism of the *sensus fidelium* depicts the needs for Tradition to be in-dwelt in the whole Church and not just in statements from the hierarchy. Indeed, Tradition has to dwell in reality and its historical and cultural context and not be trapped in abstract documents (Tracy 1981:66). Furthermore, this also shows that 'reception' of the Tradition is a two-way movement. Not only does the laity receive or reject the hierarchy's teaching so as to give actual life to it, but also such teaching is often strongly underpinned by lay people's beliefs and actions. A clear example related to this research is the notion of *solidarity*, which neither came out of the blue nor was invented by the Pope. It was the fruit of the work of numerous Catholics and people of good will who, by perceiving how the modern world was affecting human relationships, generated novel thoughts and actions based on the old biblical teachings of love and compassion. The 'coronation of solidarity' as a social and not just a personal virtue, in John Paul II's Encyclical *Sollicitudo Rei Socialis* (1987, 36-38.40), was in fact influenced and enlightened by the Solidarity movement in Poland (O'Connor 2005).

Based on this brief explanation of Catholic revelation,<sup>31</sup> the topic of this research needs to be tested accordingly. Is the CST's notion of IAD aligned with this conception of revelation, in which Sacred Scripture and Tradition take a pivotal role? To respond to this question, we need to analyse whether the Church's social teaching and its notion of human progress has a truly Evangelical root on the one hand, and if such a teaching is alive, on the other. The following chapter explores these issues through the lens of the methodology of CST.

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<sup>30</sup> Academics distinguish between *sensus fidelium* and *sensu fidei*. For Congar (1981), the latter is more a subjective quality of the faithful with which they perceive the truth of Revelation, whereas the former is the objective manifestation of what the faithful believe. For Kerkhofs (2003:292-4), *sensus fidei* refers to how believers 'live spontaneously in accordance with the great tradition of the church, and 'is seen as a spiritual instinct', while *sensus fidelium* expresses the conviction of believers that 'a doctrine or behaviour is inspired by the Gospel, even when a new situation demands new answers'. These two differ from *consensus fidelium*, a more restrictive term that means that all or most of the faithful agree with some truths belonging to the core of the faith (ibid.). See also International Theological Commission (2014) Due to limitations of space, these distinctions will not be addressed herein.

<sup>31</sup> For a full account of the problem of Revelation and the different models of understanding it, see Dulles (1992). For contentious issues around scriptural and ecclesiastical Revelation, see Nichols (2007).



## 2. Specific Methodology for Social Ethics

Jesus' teachings on loving our neighbours -even our enemies- (Lk 10:25-37; 6:29; Mt 5:46-48), on justice and forgiveness (Lk 15:11-31; 17:3-4; Mt 5:38-41; 18:21-22), on dignity of labour (Lk 10:7; Mt 10:10) and distribution of wealth (Mt 20:1-6); and on other social values has been reinterpreted by Sacred Tradition throughout history, in accordance with new socio-economic and political circumstances that required a novel reading of the original teachings. An example of this is the Papal Encyclical *Rerum Novarum* (1891), a document issued by Leo XIII in response to some of the unprecedented social changes that came along with the industrial revolution, especially with regard to workers' issues.<sup>32</sup> From then onwards, the Magisterium of the Catholic Church has been striving to interpret the new state of affairs of modern and post-modern society in the light of the Gospel. This has resulted in a set of documents commonly known as CST. Nonetheless,<sup>33</sup> as Verstraeten (2005) has cogently argued, this 'social doctrine' is not to be understood as a documentary doctrine only (i.e. a teaching coming from documents of the Pope and bishops), but also and mainly as a practical one (i.e. a teaching grounded in the practice of diverse social movements and organisations, either Catholic or aligned with Catholic social values). Indeed, as Curran (1988:426) explains, beyond the documents issued by the hierarchy, 'the unofficial canon of CST today has been brought about by the reception of the church itself and by subsequent Popes and the response of the total church', which means that 'the whole church has played a role in what is viewed today as constituting the body of official Catholic social teaching'. We can see therefore how both agents of the living tradition, the hierarchy and the faithful, are actively included in CST.

As mentioned before, each branch of theology has specific methods, and the social branch is not an exception.<sup>34</sup> The officially recognised methodology (*Mater et Magistra*, 1961 onwards<sup>35</sup>)

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<sup>32</sup> As Burghardt (1996) points out, despite the importance *Rerum Novarum* has for the social tradition of the Church, the document is not beyond criticism. For a critical analysis of it and of other documents of CST, see Walsh and Davies (1991).

<sup>33</sup> As occurs with Tradition, which needs to be seen beyond the hierarchy of the Church, Catholic social thought ought to be understood beyond official documents of the Church.

<sup>34</sup> A serious study on hermeneutics of CST can be found in Misfud (1998). For more on the sources and methods of social moral theology, see Pinckaers (1995). For an advocacy of virtue ethics as a suitable methodological framework for expressing a New Testament social ethics, see Keenan (1995 and 2002).

<sup>35</sup> *The Compendium of the Social Doctrine of the Church (Compendium)* intended a complete overview of the pontifical teachings from Leo XIII onwards, stating that this teaching offers 'principles for reflection, the criteria for judgment and the directives for action which are the starting point for the promotion of an integral and supportive humanism' (n,7). Note that although it champions the triple movement seeing-judging-acting, the starting point -the 'seeing'- are "principles" for reflection rather than empirical reality. This depicts the methodological tensions within Catholic tradition, some of them explained in this chapter. The principles for reflection are grouped in the *Compendium* as follows: solidarity & subsidiarity, human dignity, human rights & common good; participation & social-relational life; private property & universal destiny of goods; the fundamental underpinning values of truth-freedom-justice & charity (*Compendium*:105-208). These principles



for CST is the triple movement of *seeing-judging-acting*. The method has deep biblical roots, being implicitly incorporated by the Patristic and the Scholastic tradition, and explicitly developed and explained in the twentieth century.

## 2.1. Biblical roots of the method: the paradigmatic parable of *The Good Samaritan*

The biblical roots of the method can be found in different texts, among which the parable of *The Good Samaritan* (Lk 10:25-37) is considered the paradigmatic one (Schnackenburg 1991).<sup>36</sup> In order to discover why such a parable is the basis of this theological method, we need first to ask what the Samaritan of the story did. The text tells us that when a Priest and a Levite, both liturgical officers, “saw” a wounded man lying half dead along the road in their way to Jericho, they passed by on the opposite side. Unlike them, a Samaritan, after “seeing” the victim, approached him, poured oil and wine over his wounds and bandaged them. Then he lifted him onto his own animal, took him to an inn and took care of him. Furthermore, he gave instructions to the innkeeper to look after him, for which he paid. Finally, he promised to pay any further expense on his return, which in modern language is like issuing a letter of credit.

What was actually the difference between the Samaritan and the liturgical officers? It was mainly about the way their *sight* affected their *judgment* and *actions*. In the case of the Priest and Levite, “seeing” the half-dead man on the road did not affect their view of the world. Their deductive theology, for which liturgical commitments were uncontested first priorities,<sup>37</sup> prevented them from reacting to a clear injustice that appeared right in front of their eyes. Unlike them, the Samaritan, when “seeing” the same unjust situation, was moved by compassion (ἐσπλαγχνίσθη,<sup>38</sup> from the verb σπλαγχνίζομαι,<sup>39</sup> to be moved from inside, from the entrails, and express it afterwards and accordingly with external “actions”). It is worth remembering that for

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should apply when judging elements of family life as the core of society (209-254); the dignity of labour (255-322); economics, enterprise & ethics (323-376); politics, democracy & communion (277-427), international community, globalisation & integral and authentic human development (428-450); creation & the environment (451-488); relationships, conflicts & peace (488-520); culture & social transformation (521-574); civilization of love & the Church’s contribution to it (575-583).

<sup>36</sup> Note that this parable has been given an extended treatment in Sen’s *Idea of Justice*: see subtitle ‘Who is my neighbour?’ (TIJ:170-173).

<sup>37</sup> Biblical academics suggest different motives for the Priest and the Levite of the parable ignoring the wounded man lying along the road. One possible reason could be their liturgical commitments. They could well have been performing their liturgical duties, in which case touching a wounded and unknown person would have been considered impure (Schnackenburg 1991, Pagola 2013, etc.). Eventually, in the case that they were on their way to fulfil their liturgical obligations, not only did they need to avoid touching anything or anybody impure, but they could also have been under pressure of time. Whether for theological or practical reasons, they decided to continue their way.

<sup>38</sup> *Esplanchnisthē*

<sup>39</sup> *Splanchnizomai*

Luke, this is a specific characteristic of God (e.g. Lk 7:13, Jesus when seeing the grieving widow of Nain; Lk 15:20, the Father when catching sight of the prodigal son returning home), and in the Bible this characteristic also corresponds to the Servant (Is 61:1) and the happy person (Prov 14,21). Hence, what the parable is telling us is that this compassionate and inclusive way of “seeing” reflects our likeness to God, sight that even Samaritans -who were looked down on by the Israelites of the time in terms of religious beliefs- could and did have (Schökel 1998). The unknown Samaritan, a socio-religious rival for those who were listening to the story, becomes paradoxically the one who behaves as a neighbour (πλησίον:<sup>40</sup> friend, close relative), *seeing* with compassion the wounded and defenceless man, *judging* with solidarity the situation, and *acting* with justice. Indeed, by behaving as a neighbour, he has done “what is right and good”, which is the response to the question that has triggered the parable.

Therefore, the starting point of the socio-ethical reflection and action is the other’s need, or better, “seeing” the needs of other people who, if considered equal, will move us with an inner strength that shall drive us to act and change the unjust situations they are facing. Being moved by compassion for those in need is, according to the Bible, the maximum expression of a neither conditional nor self-interested love. However, it is only possible if we firstly *see* those who are in need, and then *judge* the causes of the situation and how it could be solved. This way of reflecting social issues is, thus, the best reflection of faith and actual love of God (Schnackenburg 1991:82-86); which means that ethical reflection on social issues ought to depart from here if they are to be truly Christian. Theologians approaching social concerns should put themselves in a position where they can “see” and hence “judge” the state of affairs from the point of view of the needy/oppressed/blind so as to help/free/enlighten them, following Jesus and *The Good Samaritan’s* steps or “actions”.

The Latin American theologian, Tony Misfud (1998:153), argues that the starting point of social morals is, in Christian terms, the reverse of history, i.e., history from the marginalised; it is only from here, from this “seeing” that we could give authentic and compelling Christian “judgements” on society and on its social organisation. The parable of *The Good Samaritan*, the argument continues, has not only a social dimension with regard to social responsibility, but also a methodological one with regard to theology. Christian theology needs first to get close to those wounded on their way through history, and only then should theology ask itself, through these wounded persons, “the question” of Christian social-ethics (ibid). Besides, given the clear sign of the inclusiveness of the parable, the “seeing” cannot be limited to Catholic eyes, but rather open to the eyes of social sciences and social movements. Their sight is needed in present social

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<sup>40</sup> *Plēsiōn*

theological ethics so as to “judge” ethically specific social-economic or political situations. This was the case of Liberation movements in Latin America in the 1970s, or the Solidarity movement in Poland in the 1980-90s, or the inter-faith movements in Asia in the 2000s, whose sight has enriched Catholic theology and its analysis of the social realm. It could also be the case, we argue, for considering Amartya Sen’s sight on economics and human development.

## 2.2. The method along the Patristic and Scholastic Tradition: Augustine, Aquinas and Vitoria

Although the method as such is a modern development, during the Patristic and Scholastic period there are at least three authors -or schools of thought- in whom we can find certain grounds on which the method was built. First, Augustine’s *City of God* of the fifth century is an attempt to respond to social and political issues impinging on the life of ordinary people. He therefore pioneered a somewhat systematic understanding of the tense relationship and interdependence between the secular and the sacred arena (Curran 2002:3). Augustine draws a contrast between the eternal and the earthly city.<sup>41</sup> Yet, this contrast is not meant to be a call to withdraw from the sinful and corrupt world, but rather a help to acknowledge the earthly city’s miseries<sup>42</sup> and, in the light coming from the heavenly world, improve the earthly city through actual love. For that purpose, Augustine intended to critically analyse the actual social realm [seeing], discern in the light of the Gospel its main conundrums [judge], and finally propose a course of action [acting] for Christians living in such an uncertain era, when the whole Roman socio-political and economic structure was coming to an end.<sup>43</sup>

The second author is Thomas Aquinas (1225-1274), whose use of secular literature such as Aristotle and Cicero to understand individuals and their social contexts -then reread it in the light of the Gospel- was crucial for the development of his novel theology and ethics (Curran 2002:3). Given that this dialogical approach to the social realm ‘has exerted a lasting influence on Catholic social ethics and social teaching’ (ibid.), it can be considered as a precedent to the “seeing-judging” of the method under analysis. Moreover, in his most quoted work, the *Summa Theologiae*, Aquinas gave more space to justice than to any of the other virtues, with emphasis on the relationships and actions of human beings. Therefore, “acting” as a result of critically

<sup>41</sup> Augustine, *City of God*, 1. Preface and 14.28.

<sup>42</sup> Ibid., 4.7.27.

<sup>43</sup> For a comprehensive account of Augustine’s social ethical methodology in *The City of God* see Gill (1995:55-75). Gill argues that Augustine furthered both the method and the content of Christian social ethics with this book. He ‘was faced with a radical change in the socio-political status of Christianity, was confronted with a new moral situation for which the New Testament provided few clear answers’ (p.17). In the way he responded, Augustine was confirming that the starting point of social morality needs to be the social reality, and that the Gospel can illuminate the discernment of responding to such reality, although not providing specific answers.

analysing social relations, among which God was included, was also part of Aquinas' methodology.

Thirdly and finally, Francisco de Vitoria (1483-1546), 'founder of international law, studied the political problems of his time in the light of Thomistic methodology and principles' (Curran 2002:4). Vitoria and his colleagues from the University of Salamanca addressed some of the main economic and political problems of the time, especially those emanating from the colonisation of America, such as maritime trade, slavery, war, etc. They used Aquinas and his non-Christian philosophical interlocutors to analyse the new socio-economic realm, and in the light of the Gospel, they proposed different courses of action, such as respecting the indigenous people from America as human beings.<sup>44</sup>

Nonetheless, it could be argued that these connections are not direct or explicit antecedents of the modern theological method of "seeing-judging-acting". Still, however implicit the connection may be, during the Patristic and Scholastic period, new methodological approaches in theology were being developed. They were mainly based on the analysis of the actual social context in dialogue with non-Christian and non-theological authors.<sup>45</sup> On that basis, and in the light of the Gospel and Tradition, new ways of acting ethically were proposed. Therefore, it is justifiable to quote them as precedents for the method under consideration.

## 2.3. The method in modern times

### 2.3.1. Cardjin and John XXIII: the modern incipient method

Biblically grounded, and with Patristic and Scholastic precedents, the method has also been firstly and explicitly explained in modern times by the Belgian priest Joseph Cardjin in 1930s, who realised that to make an actual contribution to improve the situation of young workers at that time of serious economic crisis, a shift in the methodological approach, at least from the theological side, was necessary. The shift should consist in detaching social ethics from a deductive approach based on a comprehensive understanding of social life, towards an inductive approach based on the particularities of the situations that were actually complicating people's lives. Cardjin's approach 'suggested that a small number of lay people should meet weekly to systematically (a) observe and discuss their environment; (b) judge the situation in the light of the Gospel; and (c) act' (Krier Mitch 2000:74). After perfecting the method, he used it to set the cornerstone of the Young Christian Workers movement, from where 'it would be adopted later

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<sup>44</sup> For more on Vitoria, the School of Salamanca and their contribution to theology and to international law, see Belda Plans (2000) and O'Meara (1992). For an overview of the school of Salamanca, see Azevedo and Moreira (2010).

<sup>45</sup> An example of this is Aquinas' study of the Muslim scholar Averroes, through whom he discovered Aristotle. Aquinas then introduced the Greek philosopher into Catholic theology (Nichols 2002).

by so many other lay apostolate groups and movements' (CCI 2011). Influenced by Cardijn,<sup>46</sup> Pope John XXIII, in his first and innovative Encyclical *Mater et Magistra*,<sup>47</sup> proposed a similar method to develop Catholic social analysis and action:

There are three stages which should normally be followed in the reduction of social principles into practice. First, one reviews the concrete situation; secondly, one forms a judgment on it in the light of these same principles; thirdly, one decides what in the circumstances can and should be done to implement these principles. These are the three stages that are usually expressed in the three terms: look, judge, act. (*Mater et Magistra*, 236).

Pope John's new official methodology breaks away completely from 'the old dogmatic device' of pre-stating that if a situation is *hypothetically* intrinsically bad, the Church is unavoidably obliged to reject it in *theory*, although it can occasionally tolerate it as a *modus vivendi*, as occurred with the notion of "democracy" until the mid-50s (Mich 2005:197-8). John therefore introduced a shift in the methodology of social analysis in the Church. From the classical "deductive" method, which basically 'understands reality in terms of the eternal, the immutable, and the unchanging', the Pope moves towards an "inductive" historical consciousness approach, which 'gives more importance to the particular, the contingent, the historical and the individual' (Curran 1988:427). But like Cardijn, the Pope's novel methodological proposal was mainly directed to young lay people, who by applying this method will acquire a knowledge that 'does not remain merely abstract, but is seen as something that must be translated into action' (*Mater et Magistra*, 237). Something more explicit regarding the theological acceptance of this method for the whole church was therefore required. This process started with Vatican II.

### 2.3.2. Vatican II: a new officialised method

The method was blessed in the Pastoral Constitution *Gaudium et Spes* (GS) (1965), where it was stated that the whole Church -and not just specific lay movements- 'has always had the duty of scrutinizing the signs of the times and of interpreting them in the light of the Gospel' (GS, 4). Moreover, 'each of the five chapters in the second part of the document deals with a specific area of concern and each begins with the signs of the times' (Curran 1988:428). For scrutinising and understanding the signs of the times, it is not possible 'to start from an abstract or apparently neutral perspective', were it ever possible, 'nor from a church that posits itself in opposition to the world, but from a social discernment rooted in the commitment of the church to be "linked

<sup>46</sup> A first draft of *Mater et Magistra* is said to be written by Cardijn. See the recent research study by Kelly (2014). This influence is also mentioned in Verstraeten (2010:149.152).

<sup>47</sup> In fact, this Encyclical 'brought a new attitude and tone to the Church's reflection on social issues...[it analyses] the growing complexity of social relationships in the controversial section on "socialization", offered concrete strategies in the agricultural sector, and discussed the social dimensions of private property and a just wage. It was the first encyclical to address issues of the developing nations. The laity was invited to employ the methodology "observe, judge, and act" in putting Catholic social teaching into action' (Mich 2005:191).

with humankind and its history by the deepest of bonds” (GS, 1)’ (Verstraeten 2010:152). However, this task is far from easy, ‘since it confronts the church with the real ambivalence of history, a history characterised by both positive trends and destructive developments’ (ibid.). Therefore, the critical analysis and subsequent judgment need to comprise a negative denunciation of destructive developments on the one hand, and a positive reading of those developments contributing to human flourishing, which are signs of the Kingdom of God (ibid.). This twofold reading-way of reality is what the biblical tradition called a prophetic approach, an attitude that is often highly contested due to the historical ambivalence in which it is involved.<sup>48</sup>

By including this historical and evangelical perspective, Vatican II distances itself from the previous methodology based exclusively on “natural law”. This method, used by *Rerum Novarum* (1891), *Quadragesimo Anno* (1931) and *Pacem in Terris* (1963) was based on Thomas Aquinas’ understanding of morality. For him, morality is what contributes to human goodness, fulfilment and happiness (*Summa Theologica* I-IIae:q.1-4). Thus, moral principles do not come from outside nature, nor are they imposed by the will of God. Rather, they have been written into human nature by God the creator, forming part of the godly-designed order. Human beings, through reason, have access to those principles. Following Aristotle’s teleological model, Aquinas designed his moral theology based on natural law, which is human reason directing human beings to their ultimate end and in accordance with nature (I-IIae:q.94).

However, the natural law method, at least in the way it was being used by previous modern documents,<sup>49</sup> had serious limitations. First, as Curran (2002:23-32) argues, the method failed to highlight the central role of Jesus Christ in Christian morality. In fact, the Gospel was quoted at

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<sup>48</sup> Historical ambivalence is reflected in ambivalent behaviour and ambivalent structures of societal organisation, as will be explained in Part III. For Tracy (1981:48-50), these ambivalences are mirrored in the Gospel of John and the Johannine epistles, particularly through the portrayed vision of ‘the world’, which includes both profound trust in the world as God’s good creation and, simultaneously, real distrust of the world as an unjust place where God’s logos and its truth and grace are rejected. While the positive meaning of the ‘world’ facilitates a universal idea of salvation and a public perception of theology, the negative meaning of it invites a more sectarian idea of Church-community and therefore a temptation to seclude theology into the private realm. However, as Tracy argues, cultural and historic ambiguities can also promote a realistic theology of denunciation (prophetic approach), grounded in the reality of human ambivalence and not in the idealistic or ideological visions of perfect societies. Besides, the acknowledgement of historic ambiguities also provides a balance between different loyalties: the loyalty to the almighty God *and* to the ambivalent world (i.e. love to God *and* to our neighbours).

<sup>49</sup> As Carrerai (2011:5-6) points out, the natural law principle, originally inclusive -since it was taken from the Stoics in order to help the first Christian communities to discuss their values in the public realm within the Roman context-, was unfortunately denaturalised when at a later stage Christianity became an official religion and its ethics became influential in positive laws. This dramatically augmented the risk of considering some juridical prescriptions on concrete issues as the will of God. Moreover, the alliance with the secular power belittled the radical message of the Gospel and its prophetic ability to challenge the *status quo*. Evangelical and universal values, such as the absolute value of human life or equality, were sacrificed for the sake of legitimising the actions of the authorities or the socio-political or economic regime. Although in the Middle Ages Aquinas introduced a novel, though traditionally well rooted notion of natural law, its interpreters often fell into the historical deviation of “naturalising” contextual laws.

the very end of the arguments just to prove the connection between the natural law principles and Christian faith. Consequently, social theology was impoverished, lacking the rich light of the Gospel and the freshness of the narratives of the Kingdom of God to interpret the signs of the times. Secondly, the method failed to recognise the reality of sin and its effects. As a result, the outcome was an over-optimistic theology, sometimes naive, unable to approach issues of power and vested interests of modern society. Thirdly, the method also failed to maintain the ‘incarnationist’ principle of Christian faith, i.e. the tension between the natural and the supernatural, nature and grace, the temporal and the spiritual dimensions of human beings, the hierarchy and the laity in the Church’s daily life and the Gospel (De Lubac 1998). This lack of tension fostered a paradoxical approach to social problems. While the message of the Church with regards to social ethics attempted to address a universal addressee, the spiritual or sacred life was almost entirely reserved to professed religious people. The laity was called to work as ‘auxiliary soldiers’ (*Quadragesimo Anno*, 141) in the earthly city. This fomented a “schizophrenic” approach to their faith: liturgy and the Gospel were totally disconnected from their daily struggles, and the search for justice was not seen as constitutive of their Christian identity.

*Gaudium et Spes* redresses the imbalance of the natural method. In its first chapter on the “Dignity of the human person”, it affirms that humans aiming at responding to their own meaning and contradictions and anxieties, can not only find responses in nature and in their likeness to the Creator, but also in the Son of Man (GS, 22). Sin and disrespect of human dignity is not omitted, but taken into account from the very beginning, not as a depressing source, but rather, in the light of the Resurrection, as something that can be restored (GS, 21). In the second chapter on “The community of mankind”, it asserts that human development can only be achieved if interdependence and social life are acknowledged, and human dignity and freedom are understood in their socialised context and in the light of the common good. The emphasis on the unique destiny of the human family blurs the distinction between the hierarchy and the religious life. All are responsible for the wellbeing of their neighbours, or, as it states later in Chapter IV, all are called to holiness (GS, 40). In the third chapter, on “Man’s activity throughout the world”, it sets a new theological method: human fulfilment and the work for justice are not merely part of the order of Creation, but also an essential part of the redeeming love of God through Jesus and the Spirit. Hence, justice is a task in which all members of the Church -the body of Christ- are involved. Although it is recognised that earthly affairs and values have their autonomy, they are not isolated from humans’ primordial questions about their nature, which include the question of God. Therefore, ‘if methodological investigation within every branch of learning is carried out in a genuinely scientific manner and in accord with moral norms, it never truly conflicts with faith, for

earthly matters and the concerns of faith derive from the same God' (GS, 36). Interdependence is not restricted to political affairs, but also to sciences seeking the truth. In the end, as a result of the incarnation of Christ, earthly and heavenly city are located in the same place (GS, 40.43).

In parallel with GS, *Dei Verbum* restored the essential role of the Scriptures in the life of the Church, i.e., of all its members and of theology (DV, 21-26). Nonetheless, aspects of the old methodological model remain in Vatican II, especially in the *Declaration of Religious Freedom* (1965), where the distinction between freedom from a natural and from a revelationist point of view are over-emphasised (Curran 2002:35). Additionally, academics argue that the second part of GS, the draft of which was not discussed or worked on as much as part one, does not follow its own method while discussing specific issues on marriage and family, culture, socioeconomic life, political community and peace. 'There is comparatively little mention of the role of faith, Gospel, grace, and Jesus Christ in this part. In a sense, the document suffers from a methodological split personality! The theological methodology developed in part 1 is not followed to a great extent in part 2' (ibid:48). Whether this is an attempt to introduce a new methodology while maintaining the previous one, thus being faithful to the Catholic "and", or whether it is a consequence of having a twofold addressee (the Church/faithful and the World/non-believers) is still under discussion (ibid.). However, regardless of these inner disputes and contradictions, there is a consensus on the fact that Vatican II did not discard the natural law approach as a valid method for social ethics.<sup>50</sup> Yet, it has complemented it with a Christological and Biblical approach, both considered direct sources of ethical wisdom. Vatican II, therefore, while recognising the importance of Creation redeemed in Christ -probably taking on the Protestant critiques on the lack of biblical wisdom in Catholic social ethics- also highlights the influence of sin and its permanent presence in the world, and introduces Christ as the new Being, thus as an anthropological model (Curran 1985:85). In other words, the Council insists on 'seeing the realities of the gospel, grace and the supernatural as having a direct relation to, and an effect on, the daily life of Christians in the world' (ibid.). Therefore, Scriptures are no longer quoted ultimately to prove what, through reason, is discovered as the right thing to do, but mainly as a valid source with which actual situations can be analysed, and from which just solutions may be found.

In short, Vatican II attempts to correct some serious methodological problems of the natural law approach, namely the failure to highlight the central role of Christ, Grace and the Gospel in

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<sup>50</sup> One could question whether the CA could help CST to recover the inclusiveness of the natural law principle, or even further its notion, given its comprehensive description of freedom and what is to be human. However, we have opted to emphasise Biblical Theology instead, following Vatican II.



Christian morality, the failure to recognise the reality of sin and its effects and include it from the beginning in the analysis of reality, and the failure in matching the natural and supernatural orders (i.e. the spiritual and the temporal, the hierarchy-religious and the laity, the Gospel and natural law) (Curran 2002:29-31). This dimension of the method for social ethics was radicalised and furthered by Liberation Theology and the Latin American Magisterium.

### **2.3.3. The Latin American Magisterium: the method developed, but not without resistance**

Following Vatican II, the Latin American Bishops moved further, going right to the core of theological methodology about social matters. In Medellín (1968), they agreed that the appropriate method for these cases is firstly to use social sciences in order to understand modern reality, and only afterwards to turn to theological reflections and pastoral guidance for action. Technically speaking, the method came to be known as the 'hermeneutical or pastoral circle', and is based on the idea that there can be no theology without a prior historical reality, and God cannot be found in texts from the past without discerning God's reality in the present (Land and Henriot 1989). Far from disregarding the divinity of Christ's reality and its priority over all other realities, as feared by some theologians,<sup>51</sup> the bishops rather launched a method for a better understanding of such incarnated reality in present times.

Since Medellín (1968), the subsequent Latin American Conferences of Puebla (1979) and Aparecida (2007) have confirmed the method. Puebla even asserts that the method is inextricably related with Catholic identity. Indeed, for Puebla, seeing and analysing reality with socio-historical eyes is to follow Jesus' steps, permitting the Church to discern and judge ideologies concerning poverty and economics and to fulfil its mission of evangelising through promoting integral liberation and human dignity to all human beings regardless of their belief, race, sex, etc.<sup>52</sup> Although the method was side-lined by the Santo Domingo Conference in 1992, Aparecida (2007) resumes the method confirming its validity for theological *and* pastoral social ethics. It also states that the method enables the Church to combine, systematically, criteria of

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<sup>51</sup> In the first centuries of Christianity, a Christological debate arose on the nature of Christ. Theologians and schools were divided between those who emphasised the humanity of Christ (e.g. Arius, Nestorius and the school of Antioch), and those who emphasised the divinity of Christ (e.g. Bishop Apollinaris of Laodicea and some members of the school of Alexandria). Councils of Nicea (325), Constantinople (381), Ephesus (431), and Chalcedon (451) clarified the discussion: Jesus is truly human and truly God, 'consubstantial' (ὁμοούσιος) with God the Father. Still, the debate continued, and the Council of Constantinople (553) had to expound the dogma by stating that Christ's human nature is not a kind of personal subject, but rather is to be attributed to his divine person (*Catechism of the Catholic Church*, 464-469). For a detailed history of the development of the dogma, see Sesboue and Wolinsky (1995).

<sup>52</sup> See *Evangelisation*, Ch. 5, Point 4: "Liberation and Human Promotion" and Point 5: "Evangelisation, Ideologies and Politics" (nn.476-562).

‘faith and reason’ for viewing reality and appraising it critically, and for the discernment of how to act accordingly as Christ’s disciples (n.19).

### *An impasse of the method: Santo Domingo and the reaction to Liberation Theology*

As indicated before, the method was rejected at the Conference at Santo Domingo (1992), a fact that cannot be omitted in this study. In order to understand more deeply the reasons for this impasse, in which the bishops tried to go back to the classical *a priori* or deductive theological method and abandoned the historical and inductive approach -even though the latter was more aligned with the teachings of Vatican-II for social concerns (GS) and with the two previous Latin American Conferences-, we need to refresh the ecclesiological context of the 1980s that preceded the Santo Domingo conference.

The 1980s was a decade when the Church decided to clarify the internal confusion provoked around Liberation Theology, which has had a strong influence not only on pastoral issues in poor regions of the world, especially in Latin America, but also on the universal Magisterium (Misfud 1998). Indeed, Liberation Theology has left at least two universal legacies to Christian theology in general and to the Catholic Church in particular: (i) the “option for the poor”; and (ii) the “hermeneutic methodology”. The prolific Magisterium of the then new Pope was keen on adopting both legacies (Yañez 2008;2011; Door 1992). In his first Encyclical (1979), John Paul II strongly asserts that progress is an essential part of human nature (*Redemptor Hominis* 15). Therefore, when progress is denied, something that often happens with poor and helpless people, then the Church must raise its prophetic voice against such a violation and work along with people of good will to reverse such inhuman situation. Two years later, in an encyclical on labour issues, the Pope confirms that the Church is “of” the poor, which means that all its structures and members are bound up to their causes (*Laborem Exercens* 1981:8). Close to the end of the decade, in an encyclical on social matters, he confirms that the option or preferential love for the poor is not only an essential part of the Church Tradition, but also is -or should be- considered of prime importance to every single Christian (*Sollicitudo Rei Socialis*, 1987:42). At the start of the new decade, the Pope once again addresses the issue stating that the Church has a preferential option for the poor (*Centesimus Annus* 1991:1.6.11.57). Although he clarifies that this option is neither exclusive nor discriminatory, he emphasises that it is not to be considered just as a spiritualistic principle, because it is only made concrete in the actual promotion of justice (n.58). Theologically speaking, fulfilling the preferential option for the poor means to start from below, from the reality of the most needy which needs accurate critical appraisal. However, it

was at this point –among others- that John Paul II distances himself from Liberation Theology. This issue has a history which can be summarised as follows:

In 1974, Paul VI ordered a special study on Liberation Theology, led by four eminent theologians: H. Schurmann for biblical analysis; O. Gonzalez de Cardedal for ecclesiological concerns; H.U. Von Balthasar for a dogmatic study; and K. Lehmann for a methodological examination. The commission issued a dossier on Liberation Theology (1976),<sup>53</sup> in which it praises the prophetic cry of the Latin American Church, which, being confronted by the all-pervading poverty of its society, was making its mind up about the need to liberate the poor from this oppression and promoting actions accordingly. All this was deeply rooted in biblical words and being analysed under the light of the Gospel. However, the commission warned the Pope about several issues concerning Liberation Theology, such as the ambiguity regarding ‘violence’ and some eschatological matters (Linden 2000). After that document was issued, concerns about Liberation Theology rose dramatically, more so considering the increasing violence in Latin America, where the poor were being oppressed not merely by economic issues, but also by political dictatorships (Gibellini 1997). Confusion regarding the way to initiate and achieve human liberation abounded, and disarray on how to cope with different liberation movements - some of them radical Marxist movements- provoked serious violations of human rights by the Latin American governments. In 1984, therefore, a new study on Liberation Theology took place, not by an international commission of experts, but by the Congregation of the Doctrine of the Faith (CDF) chaired by Card. Joseph Ratzinger. The document recognised that the Latin American church had spotted a crucial sign of our times, namely human aspiration for liberation from evil structures that foment poverty. However, the document was deeply critical of the ambiguity regarding violence; of the suggested division of the Church between a popular-sociological Church and a hierarchical-theological one; of the confusion about God’s plans for salvation with a specific socio-political order -i.e. socialism; and, with regard to methodology, of the uncritical acceptance of Marxist analysis of reality. This latter observation, according to this document, can turn Christian faith into an ideology (CDF 1984: VI:10).

In 1986, another document, *The Vatican Instruction on Human Freedom and Liberation*, issued by the same office, tried to balance the probably too tough position taken two years before.<sup>54</sup> Thus it praised Liberation Theology for recognising and interpreting the process of liberation as historical, although it warned against de-humanising the process by either

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<sup>53</sup> The document is entitled: *Human Development and Christian Salvation*. For comments on the International Theological Commission’s documents, see Sharkey and Weinandy (2009).

<sup>54</sup> For a good summary of the difference between the 1984 and 1986 documents of the CDF on Liberation Theology, see McAfee Brown (1993).

individualistic or collectivistic projects, which can, respectively, either stress the gulf between the rich and the poor or foment violence and repression. To avoid this happening, CDF (1986) argued, social analysis and 'readings' of reality cannot be taken uncritically by theology.

These two Vatican interventions were a warning to the Latin American Bishops about the way the legacy of Liberation Theology was going to be received at the next Conference, a warning confirmed by the Pope's inaugural speech at Santo Domingo in 1992. Apart from this pressure, the bishops were seriously preoccupied by the extremely complex social reality and the way they should lead the Church in responding to it. Their anxieties grew as they realised the tremendous risk of supporting directly or indirectly responses identified with violent or anti-religious approaches (Schrijver 1998). Under these pressures and anxieties, the Latin American Bishops gathered in Santo Domingo decided to set aside the method of seeing-judging-acting. Driven by fear of what social analysis can bring into theological reflections, the bishops then decided to take refuge in the safe fortress of deductive theology. However, given that the option for the poor and the need for a prophetic attitude were ratified at that same Conference, the safe enclosed theological methodology was not able to keep its citizens (theologians, pastors, community agents, etc.) inside their "safe" walls. Moreover, the method had already been accepted by the Latin American theological and pastoral ethos and was being implemented across the whole continent. Thus, a document contradicting this ethos forged by previous Conferences of Bishops and even by Vatican II, did not carry enough weight to bury the incipient hermeneutic method. If a new socio-economic order based on human dignity, justice and solidarity was urgently needed in Latin America -agrarian reform included- (Santo Domingo 1994, 296.177), if unjust economic structures fomenting violations of human rights by generating extreme poverty were desperately needed to be transformed (ibid.:166), then realistic proposals cannot be "deduced" from dogmatic theology alone, but rather "induced" from the dialogue between theology and other sciences. In such dialogue moral theology can contribute, with the experience and data obtained from its sibling pastoral theology, whilst being enriched by serious analysis of other disciplines. After such dialogical 'seeing', moral theology can 'read or judge' reality in the light of the Gospel and propose new courses of 'action'. For this reason, this Latin American legacy with regard to methodology was not to be negated, and in the new millennium, the bishops of that continent officially resumed the methodology, which they recognised was already being applied by a great number of theologians, pastors and communities with good results (cf. Aparecida 2007, 19).

### 2.3.4. The Universal Magisterium: the continuity of the new method, with ambiguities<sup>55</sup>

While the Latin American Bishops were the ones who explicitly accepted the historical-inductive method seeing-judging-acting<sup>56</sup>, the universal Magisterium needed to travel a longer journey in order to acknowledge it.<sup>57</sup> Therefore, the acceptance was more gradual, and not without ambiguities.

#### *Paul VI: applying the anthropological basis of the method*

In 1971, Paul VI's apostolic letter *Octogesima Adveniens* showed explicit sympathy with the method, continuing with the transition from a classicist view of the social order to a historical minded one, initiated by his predecessor John XXIII (Curran 1985). When social issues are at stake, the Pope argues, actual solutions cannot be found merely from universal principles. Conversely, it is firstly necessary to critically analyse the cultural and historical particularities of the cases so as to find actual solutions or accurate course of actions. Such analysis, if it is to have a minimum objectivity, requires dialogue with other sciences, especially the social ones:

In the face of such widely varying situations it is difficult for us to utter a unified message and to put forward a solution which has universal validity. Such is not our ambition, nor is it our mission. It is up to the Christian communities to analyse with objectivity the situation which is proper to their own country, to shed on it the light of the Gospel's unalterable words and for action from the social teaching of the Church. (*Octogesima Adveniens*, 4)

One of the socio-historical realities that the Pope highlighted, was the aspiration to freedom, equality and participation, the three of them now recognised as forms of human dignity (n.22). This recognition is worth mentioning, because it depicts the shift in the anthropological approach and consequent methodology of the universal Magisterium on social issues (Curran 1985).

During the nineteenth century, the Church opposed freedom and other thoughts coming from the Enlightenment, particularly because of their over-emphasis on the 'individual' –belittling the importance of the social and religious dimension of the individual person. Indeed, if freedom of worship means to ignore the one true God and religion, if freedom of speech means to obscure the truth by honouring any speech, even when it is wrong, if freedom of conscience means

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<sup>55</sup> It is not the purpose of this thesis to address all the implications of the social-ethical methodology of the Universal Magisterium. Hence, and following the North American theologian Charles E. Curran, we will focus our analysis on the anthropological basis upon which the method was accepted and received by the Magisterium.

<sup>56</sup> North American Bishops also accepted the method in two pastoral letters: *The Challenge of Peace: God's Promise and Our Response* (1983), and *Economic Justice for All: on Catholic Social Teaching and the US Economy* (1986).

<sup>57</sup> According to the Argentine theologian Miguel Yañez, s.j. (2011), the inductive methodology of CELAM documents cannot be detached from their overarching principle of the preferential option for the poor, a legacy coming from Liberation Theology. For this particular reason, the method was resisted in Santo Domingo (as explained in 2.3.3) and was only gradually incorporated in the universal teaching.

absolute subjective right to do what ones pleases and to ignore God's will and social duties, then this kind of freedom could not be accepted by the Church, whose conception of society at that time was based on natural law and order (ibid.). However, this position was softened in the twentieth century, especially when the Church was forced to deal with the reality of new totalitarian political regimes such as Nazism, communism or fascism. Under those circumstances, the Magisterium started to speak on behalf of individual dignity and freedom, natural gifts that should never be violated in the name of the State or in the name of capitalism (see Pope Leo XIII 1891, Pius XI 1931). The Church then accused both communism and liberalism of wreaking havoc on individuals and societies, and urged Christians not to follow their proposals. Still, despite the anthropological shift towards the individual, the Magisterium's speech 'stressed order and social cohesiveness rather than freedom' (Curran 1988:430<sup>58</sup>). According to Leo XIII, any socio-political and economic system is wrong when it systematically denies the existence of God (atheism), or proclaims that every single person is a law unto herself (individualism), or proposes a morality totally independent from the divine or from natural law (relativism), or imposes the collective reason of a given community to be the supreme guide of social life (Curran 1985:9). This remaining stress on the social, universal and deductive anthropology, prevented the Magisterium from fully accepting the incipient historical-inductive method for social theology, precisely due to the fear that by applying it, atheism, individualism, and relativism could pervasively irrupt Catholic theology.

A further step towards the anthropological basis of the method was made by John XXIII. Far from partially recognising individual freedom, John XXIII unprecedentedly championed 'human rights' based on the dignity of each person (*Pacem in Terris* 1963). He added though the corresponding duties, so as to avoid falling into individualism; still, freedom, dignity and equality were stressed in a novel way (Curran 1985). Social life, therefore, is to be based on truth, justice and love, and also on individual freedom. Consequently, not only the rights of the workers to have a decent income and to organise themselves into unions should be protected –as stated by previous popes–, but also their rights –and the rights of all humans beings involved in productive activities– to take part (have a partnership) in enterprises and policies, by which means they not only contribute to the organisation of society, but also to their own personal perfection (ibid.: 13). Responsible freedom and participation were meant to change the unjust *status quo* of those at the bottom of society. We can see the link between this anthropological stress on individual freedom and participation so as to forge justice, with the methodological use of an inductive-

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<sup>58</sup> For a comprehensive understanding of the anthropological grounds of the changes proposed by Paul VI in *Octogesima Adveniens*, see Curran 1985:5-42; 43-69.

historical approach in theology so as to find just solutions to unjust situations.<sup>59</sup> In both cases, participants are well equipped to read the particular signs of their social concerns, and in the light of the Gospel and of the principles of social teaching, to discover accurate proposals that can make a difference to the social order.

The anthropological basis of Vatican II was also crucial for taking one step forward regarding the social morals methodology. Indeed, the dignity of the human person became the cornerstone of *GS*, upon which the teaching on ethics, equality and participation has developed. Ethically speaking, Vatican II shifts from an objective basis, where the role of law was at its centre, towards a subjective ethical form, where the centre is the individual conscience (Curran 1985:14). This of course does not mean accepting relativistic individualism, but rather the acknowledgement that the truth can be found in the innermost depth of one's existence, even through the subjective conscience. Given its relational nature, conscience needs constant interaction with others' and with God's Revelation. Given the fallible functioning of any human mechanism, conscience also needs permanent corrections in reference to the objective truth, good and justice (ibid). With regard to equality, after Vatican II it no longer appears within (brackets), i.e. as an exception to the natural inequalities between persons and social diversity among cultures and classes, but rather between "inverted commas", i.e. as the basis of the fundamental rights of human beings. Hence, any discrimination, whether 'based on sex, race, colour, social condition, language or religion, is to be overcome and eradicated as contrary to God's intent' (*GS*, 29). But what is interesting is that for the Council, excessive economic and social difference is also a way of discrimination that violates human dignity and threatens social peace (ibid.). Likewise, the lack of opportunity to participate in public affairs or in common endeavours militates against human dignity and freedom, hence against God's plan for social communion (*GS*, 31).

To summarise, John XXIII and the Council he opened have left a solid anthropological approach compatible with the inductive-historical method for theological studies in social issues. That is why the following papal encyclical *Octogesima Adveniens* came as no surprise (Curran 1985:15). By recognising the anthropological aspirations of freedom, equality and participation<sup>60</sup>

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<sup>59</sup> This connection is crucial to the argument of this thesis, which links Sen's notions of equality, freedom and participation (focused mainly on the individual and his capabilities) with that of CST (focused mainly on the person and her relations). The anthropology behind both approaches, though not equal, is still compatible. See Part II, last chapter, and Part III.

<sup>60</sup> More on the anthropological aspirations of freedom, equality and participation will be addressed in Part III. Chapter 10 will study how a relational anthropology is required in order to promote development/freedom, something is furthered in Chapter 11; Chapter 12 will investigate the link between equality, participation and justice.

as crucial to the new social context (*Octogesima*, 22),<sup>61</sup> Paul VI sets the basis for local communities and lay people to read the signs of the times and find, in the light of the Gospel and CST's principles, solutions to social concerns (n.4), especially on issues of lack of freedom, inequality and on the impossibility of taking part in common endeavours. Although this would be a solid basis to propose a dialogue between CST and CA, we still need to analyse whether Paul VI's anthropological grounds for social-ethics' methodology was followed by his successors.

*John Paul II: method accepted, but with philosophical and ecclesiological reservations*

The long era of John Paul II is perhaps more ambiguous with regard to the CST inductive method. On the one hand, John Paul confirmed the anthropological basis promoted by his predecessors John and Paul with regard to dignity, freedom and participation, particularly when it was necessary to stand up against totalitarian regimes akin to communism, or against utilitarian capitalism that blurs human dignity by the exploitation of workers (Curran 1988:432). On the other hand, however, the inductive method, when applied to moral theology, did not convince the pope-philosopher, who feared that such a method might forge relativism and confusion among believers and compromise Catholic social doctrine (Curran 1985:32-36). Likewise, while John Paul welcomed and blessed the option for the poor inherited by liberation theologians, he was reluctant to admit their historical-inductive method, because such method stressing particularities may impair the unity of the universal church and its central authority (Yañez 2011; Curran 1988:429). In other words, the Polish pope explicitly consented to the anthropological and biblical basis of the method, but for gnoseological or ecclesiological concerns, he would not acquiesce in the method itself.

From a gnoseological perspective, the Pope was determined to battle against the increasing relativism of modern society, in particular because it was seriously affecting sexual and family moral values (Curran 2002). In this regard, the Pope wanted to clarify the many incipient moral methods that, he argued, were not aligned with Catholic faith, such as extreme proportionalist and consequentialist approaches.<sup>62</sup> From an ecclesiological perspective, the Pope was concerned about the implications of an over-emphasis on particular insights and local interpretations of faith matters. The tension between the universal and the particular was, in the view of the Vatican,

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<sup>61</sup> Although from an economic perspective, these anthropological aspirations of freedom-equality-participation have been noticed and studied in detail by Sen during the 1970s and 1980s, and further developed during the following decades, as will be explained in Part II.

<sup>62</sup> See *Veritatis Splendor*, 34ss. For a thorough debate on Proportionalism, see Williams (1972), Hoose (1987), Kaczor (2002), Porter (1989), and López Azpitarte (2003). For a comprehensive account of consequentialism, see Pettit (1993), Mulgan (2001), Sen (1999, 2009) and Singer (2002, 2009). See also Appendix 1.



not at its best; it was unbalanced or biased against the universal. For this reason, the authority of the universal magisterium and its mission to maintain the unity among local churches was considered at risk (Curran 1998). Besides, fears arose dramatically about the extent to which a too-historical theological method with an emphasis on particular circumstances can mar the classical deductive method, based on universal principles and natural law.

These gnoseological and ecclesiological concerns were clarified in *Veritatis Splendor* (1993), where the pope reaffirms the universal truth of Jesus Christ and the universality and immutability of some moral commandments, particularly those that always and without any exception forbid “evil acts” (n.115). Nonetheless, and despite this clarification, moral methodology was in practice divided between sexual and social ethics (Curran 1998). While the former persevere in emphasising the classical method, deducing their conclusions from universal truths derived from natural law, social ethics, in contrast, continue with the new reformed and inductive methodology formerly and officially initiated by John XXIII.

In *Sollicitudo Rei Socialis* (1987), the Pope confirms the shift in social ethics from a deductive to a more inductive or historical approach. From the very opening of *Sollicitudo*, the Pope states that the Church ‘reads events as they unfold in the course of history’ (n.1). Hence, the argument continues, ‘the teaching in the social sphere... is ever new because it is subject to the necessary and opportune adaptations suggested by the changes in historical conditions and by the unceasing flow of the events which are the setting of the life of people and society’ (n.3), events noticeable and especially new after the Great Wars, which require a corresponding new analysis. For such analysis, as *Octogesima Adveniens* (n.4) previously stated, CST can contribute with ‘principles for reflection’, ‘criteria of judgment’, and ‘directives for action’ (n.8). According to Land and Henriot (1989:69-70), ‘this seems to be a clear recognition that reality has forced the social thinkers of the Catholic Church to abandon the rigid application of natural law to the social order, as if all possible concrete situations were already envisioned by that law of nature’.

As Chenu (1979) explains, for Vatican II, those changing situations in which people live are a crucial *locus theologicus* where the signs of the times are read. John Paul II followed this trend and decided to abandon a moralising approach to social doctrine (Land and Henriot 1989:72-3). In contrast to some of his predecessors such as Leo XIII, who failed to analyse (see and judge) the structural causes of the abuse of workers, John Paul, when analysing world injustice, goes right to the heart of the matter, identifying ‘sinful structures’ that disrupt interdependency and foment dependency of poor nations on the rich ones (*Sollicitudo*, 36-37). By recognising that modern underdevelopment is not merely economic, but also cultural, political and human (n.15), the theological social analysis ought to be related to such respective sciences if it is to collaborate

with actual solutions.<sup>63</sup> Furthermore, *Sollicitudo* does not reject the notion of human development underpinning *Populorum Progressio* (1966), strongly anchored in natural law, but rather it complements it with biblical insight,<sup>64</sup> which allows the Pope to “see” in depth the presence of sin among the structural organisation of society. With regard to “actions” to be taken, *Sollicitudo* ‘stands in the line of legitimate pluralism’. First, it argues that the particular cultural, geographical and political conditions of the people need to be considered (n.44). Second, and following *Populorum*, it confirms that the Church does not have technical solutions to offer to the problem of economic underdevelopment, nor to political international dependency, nor to the demographic problem, nor to ecological issues. However, in the light of the Gospel and through a preferential option for the poor, the Church can give practical basic guidance on such global puzzles (nn.15-17.25.28.39-46). In short, Land and Heriot (1989:74) conclude, *Sollicitudo*, ‘experientially in touch with today’s reality through a reading of the signs of the times, analytically focused on the global structures of underdevelopment, theologically sensitive to both tradition and scripture, and pastorally open to whatever system respects authentic human development’, has enormously contributed to the methodology of CST.

This is somehow represented in the other two social documents of John Paul II: *Laborem Exercens* (1981) and *Centesimus Annus* (1991). Hence, with John Paul not only has the historical method for social theology not been denied, but its anthropological and pastoral basis has been confirmed. A question mark remains, however, on how to interpret John Paul’s understanding of ‘reading the sign of the times’ (L.Azpitarre 2003). Conservative and liberal theologians will dispute whether it is to be understood as a total opposition to Liberation Theology<sup>65</sup> and any kind of Marxist analysis (Quade 1982; Weigel 2003), or if it is to be seen as a confirmation of the starting point of reality from the perspective of the poor, aiming at social transformation, for

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<sup>63</sup> This recognition is pivotal for this Thesis, in which we argue that CST analysis of reality can enter into an alliance with Sen’s approach in order to tackle underdevelopment. See last chapter of Part II and Part III.

<sup>64</sup> See 2.3.2. and Part III.

<sup>65</sup> For good and comprehensive introductions to Liberation Theology, see: McAfee Brown (1993), Libanio (1989), Rowland (ed.) (1999), and Linden (2000). Given that Liberation Theology cannot be considered as a unitary block, aside from the extreme blocks, i.e. the praxis of revolutionary groups on the one hand, and a merely pastoral-spiritual approach on the other, two main blocks can be identified: (a) emphasis on the praxis of the Latin American people through the cultural aspects of the popular ethos (e.g. the Argentineans Gera and Scanone); and (b) emphasis on the historical praxis of oppression and liberation (e.g. the Peruvian Gutierrez and the Brazilian brothers Boff) (Gibellini 1987). Good introductions corresponding to those blocks are Scannone (1975), Gutierrez (1973), Boff and Boff (1987) and Segundo (1976). For an excellent account of the Christology of Liberation Theology, see Sobrino (1994), and for its ecclesiology see Boff (1985 and 1986). For a synthesis about the debate around Liberation Theology, see Gibellini (1987). For critics on Liberation Theology, see: Vatican critique (CDF 1984, 1986); Kee (1990) and Milbank (1990) regarding the limitation of an exclusive Marxist and Nietzsche analysis for modern complex social issues (Cambridge critique); and Welna (1992) and Sirico (2012) for a Catholic-liberal critique.

which any dialogue with other readings is possible insofar as they are then judged in the light of the Gospel (Door 1992; Curran 1988; Yañez 2011).

### *Benedict XVI: the method still unfolding*

With the era of Benedict XVI, ambiguities over the method continued. As Lisa Sowle Cahill (2010:298) explains, 'Joseph Ratzinger and the Benedict of 2005-2007 gauge their theology and politics to the needs of a specific existential situation: the secularisation of Europe and the breakdown of European unity'. His Christology, depicted in *Jesus of Nazareth* (2007, part 1), over-emphasises Christ's divinity and the world-transcending identity of Jesus Christ based on the Gospel of John (Sowle Cahill 2010:299). His intention was to counter what he thought was an over-emphasis on Christ's humanity, fostered by contextual and liberationist theologies which, based on the Synoptic Gospels and influenced by the inductive method, were, in his view, unable to promote Christian identity in the secularised Europe and to widen the Europeans' connections with God. Although 'Ratzinger claims to accept modern exegesis, he dissociates himself from virtually all results of historical-critical research, which he perceives as denying the divinity of Christ and the role of faith in biblical interpretation' (ibid.: 296).

### *Discontinuity*

The social ethics that parallel this somehow a-historical Christology, views 'holy neighbourly love as proof of the inner-worldly presence and power of God' (ibid.: 299). Consequently, love was seen more as an individual charitable action rather than as a social action for transformation. Although *Deus Caritas Est* (2005) affirms the need for political action, guided by objective norms (truth), and highlights the importance of a public space for faith, charity and religion (n.304), it does not stress the need for structural change in the public arena, at least not as an obligation or essential mission of the Church. Indeed, political work or reformation 'for a just ordering of society' is appropriate for 'the lay faithful, but not the Church' (n.29). For Benedict, indeed, the public role of the Church, although it cannot be separated from the struggle for justice, is more focused on the purification of public reason and on 'the reawakening of those moral forces without which just structures are neither established nor prove effective in the long run' (ibid.). These statements prove that the Pope was setting forth forcefully the Augustinean distinctions between charity and justice, the church and the state, the heavenly and the earthly city (Murphy 2007:281). Therefore, the main point of acting charitably is -in this view-, to witness to the supernatural, not to change the natural order (Sowle Cahill 2010:298).

The differentiation between the Church, the laity and the world, as well as the stress on the supernatural was certainly a step backwards regarding the methodology for Catholic social ethics.

The supernatural emphasis is presented as an obstacle for the ecumenical starting point, based always on the natural dimension of social organisation. The differentiation between Church/laity/world is a consequence of the supra-natural emphasis. As part of their Christian belief, the faithful must aid the needy, alleviating their hunger, poverty and illness (*Deus Caritas* n.31). Yet, social reformation to prevent poverty from happening was regarded with suspicion. The Pope adamantly opposed 'ideologies aimed at improving the world' (n.31), such as secularism and Marxism (n.26.33). Interacting with such models to discern social concerns and to find responses to them was unlikely to be compatible with Benedict's proposal for the recovery of a Christian Europe. It was indeed compatible with what the early Ratzinger had argued: that 'the quest for freedom and the aspiration to liberation from every oppression... find their first source in Christianity' (CDF 1986:5). For Ratzinger, still, the resumption of such a source, leads us to consider love as the primary attitude to "discern", to "judge" and to "act" on. Although Ratzinger explicitly clarified that love cannot be divorced from the desire for justice at the expense of distorting both charity and justice, in his view, a merely political reading of biblical justice is a complete misunderstanding of the person of Christ and the specific character of the salvation he brought (ibid.:27.55.57). Defending Christian Europe and finding equilibrium between personal charity and the search for justice, key aspects of Ratzinger's theology, was in the end preventing Catholic social methodology from advancing further.

### *Continuity*

However, as Sowle Cahill (2010) illustrates, Benedict's latest encyclicals *Spe Salvi* (2007) and *Caritas in Veritate* (2009), his intervention in the Second Synod for Africa (2009), and his messages for the World Day of Peace of 2009 and 2010, have proved a shift in the Pope's theology and methodology. The Pope moved from an over-emphasis on the supernatural and the spiritual towards a more balanced view, thus permitting the continuity of CST methodology. Firstly, there is an implicit view 'of Christ and Christian faith as enabling charity and hope, not only as interior dispositions or gateways to eternity, but also as active, practical virtues through which Christians join with others to work for global justice and structural change' (Sowle Cahill 2010:292). As a result, the Pope prioritises human development as an essential part of Christian mission (*Caritas in Veritate*, 13). To foster this development, charity should lead to 'courageous and generous engagement in the field of justice and peace' (n.1), and warns about a meaningless charity disconnected from any 'social, juridical, cultural, political and economic' significance (n.2). This was a further argument to reinforce what Ratzinger had explained back in 1986: that, contrasting love of our neighbours to the desire for justice, is to denaturalise both notions (CDF 1986:27). Hence, it seems fair to conclude that the pastor Benedict has somehow rebalanced the

idea of charity *and* justice (n.7), grace *and* nature, the divinity *and* the humanity of Christ, held by the theologian Ratzinger.

Furthermore, and after analysing the new global social problems, especially those scandalous situations in Africa (Sowle Cahill 2010:305-6), the Pope took up John Paul II's message of structural sin, and proposed structural changes in order to tackle poverty, to reduce the increasing gap between the rich and the poor, and to reduce pandemic diseases, military expenditure, etc. (World Day Peace, 2009). Therefore, conversion is not merely a matter of the individual, but also a social one, particularly in international commerce and finance and in civil society (ibid.). The individual and social expression of charity were then depicted by the Pope in terms of 'the preferential love for the poor', and this in spite of his "almost visceral" aversion to Marxism and to the supposed Marxist-derived 'anarchy' of liberation theology (Sowle Cahill 2010:304).

This has been a breath of fresh air to Catholic social ethics. For the early Ratzinger, overlooking sin as part of the social analysis was one of the reasons to disregard an interdisciplinary approach to social analysis (CDF 1986:27). Yet, while applying the principle of structural sin developed by his predecessor in *Sollicitudo*, the pope Ratzinger was implicitly recognising the need to interact with different views in order to find out the causes of structural sins. What is more, if the newness of Christ is essentially related to the liberation from sin (ibid.), where the social, cultural, political and economic dimension of sin are recognised, Christ's newness cannot but be also reflected in new socio-political paths that can set free the millions of people oppressed by such structures. The Church has therefore a responsibility in collaborating in the analysis of freeing people from oppressive structures, analysis that cannot omit the cultural-political and economic view. For that to happen, reading the signs of the times along with social sciences seems to be a vital role for the Church today, as this thesis argues. In the search for the common good, the Church not only depends on lay participation in social and political institutions, but also assumes integral partnerships with non-Catholic and nonreligious agencies and projects.<sup>66</sup>

Widening the notion of charity to social structures and the urgency for support of the most needy was not the only shift of Benedict XVI's papacy. The Pope has ensured that love or charity is not restricted to humans, but also to their environment: 'The way humanity treats the environment', the Pope affirms, 'influences the way it treats itself, and vice versa' (*Caritas in Veritate*, 51). Therefore, part of the mission of the Church is also to protect the environment

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<sup>66</sup> As will be argued later, Sen is a potential partner to assess poverty and reduce injustices (see Part II, last chapter, and Part III).

(World Day Peace 2010). How to do it without an interdisciplinary view and a discernment of the problems and solutions affecting the present environmental conundrum?

We can see how this more 'extroverted' vision of Christology, reflected in the later documents of Benedict, has led to a new way of 'ecumenical' *seeing* the world and its social conundrums. Consequently, this has engendered a renovated ecclesiology, which sees the Church as a key global agent in seeking global justice, in protecting the environment, and in promoting the poor and a preferential love for them, both individually and socially considered. The way of *judging* injustices, hence, cannot be made in theological isolation. Benedict acknowledges the need for global partners, especially in the financial-political and environmental arena, so as to study these issues in collaboration and to decipher its 'structural origins'. Lastly, the *acting* of charity and justice -which includes the work on structural socio-economic and cultural-political injustices-, needs a joint-venture of Catholics, non-Catholics and even non-believers. In an attempt to forge this venture, Benedict reasserts that God's presence and grace is seen in all those working for justice and in solidarity with fellow human beings (*Caritas in Veritate*, 38. 78).

Despite this enlarged view of Christology and Ecclesiology which allows confirmation of the CST methodology of "seeing-judging-acting", Benedict's approach, as Sowle Cahill explains (2010:319), was a somewhat ambiguous work in progress. In *Caritas in Veritate's* introduction and conclusion, as well as the first chapter, a specific 'integral' understanding of *Populorum Progressio* and other documents is argued. Because in these chapters the "seeing" and "judging" is understood in a deductive way, the dialogical approach of the CST method is blurred. In addition, while the Pope used a contextual methodology (the "seeing" of Africa's scandals) to judge global injustices and to confirm that justice work is essential for Christians and an intrinsic responsibility of the Church, subsequent Vatican complaints about Caritas Internationalis' mission, i.e. not evangelising but instead being socio-politically oriented (Mickens 2011), proved that Benedict's shift still needed to be trickled-down to Vatican officers. Still, Benedict's 'global reorientation illustrates the fully incarnational and hence historical dimension' of theology, especially in social ethics (Sowle Cahill 2010:319). During the last years of his papacy, by addressing new contexts, audiences, and social problems, the process begun with *Spe Salvi* (2007) was gradually developed, thus further confirming CST methodology. For example, in the post-global-financial crisis -a novel situation which requires insightful views and novel solutions-, The Pontifical Council of Justice and Peace (2012) highlighted the importance of the "seeing-judging-acting" method in order to place the Church in a collaborative position with nations, institutions and people, so as to find ways out of the crisis. Due to Benedict's ambiguities, the

role of his successor was to be fundamental for the methodology used by the Church in order to read the signs of the times.

### *Francis: enhancing the method*

Pope Francis has given strong and clear signs of approval for the inductive/bottom-up/interdisciplinary method in CST. While addressing the Latin American Bishops on his trip to Brazil, Francis (2013b) explicitly mentioned the CST method 'seeing-judging-acting'. Not only did he praise the bishops for continuing to apply that method in their later document Aparecida (2007:19), but also critically pointed out the risk comprised in the method, i.e. to have an "aseptic" view of reality, as if the 'seeing' could ever be neutral and impartial. The new Pope has openly admitted that the 'seeing' of reality is always affected by our view, our sight. A great temptation, he argues, is to pretend to have *aseptic-impartial-objective* views of socio-economic problems and therefore attempt to impose it on others who have *contaminated-partial-subjective* views. For Christians, a possible way to avoid this temptation is to take 'the path of discipleship'. The view of the disciples of Christ, while chiefly influenced by the values of the Kingdom of God, was also affected by the historic and cultural surrounding views (Aparecida 2007:20-32). Thus, the current disciples of Christ need to address the new social realities with the eyes of the Kingdom in connection with the eyes of the world. When the views of the Kingdom and of the world (e.g. other sciences) go *pari passu*, the creativity to find effective "actions" which can redress injustices is possible. Part III of this dissertation will follow this approach by matching the values of the parables of the Kingdom with Amartya Sen's CA.

In his recent Apostolic Exhortation to Christians *Evangelii Gaudium* (2013), Pope Francis explains why, in order to spread the joy of the Gospel and discover creative paths for human advancement, Christians cannot be detached from community life, their local contexts, and the engagement with 'others' (nn.11,177,178,234). Following Paul VI's approach, Francis argues that the enhancement of the Kingdom of God, inextricably linked with human life, human advancement, and the care of the environment (nn.178,181,215), is thus related to particular social, geographical and historic realities. In order to find concrete responses to those contingent situations, and to promote IAD and the common good, the Church's teaching cannot but 'take into account the contributions of the different sciences' and be engaged in a public dialogue with politics and economics (n.182), as this Thesis explores.

Francis also addressed in detail the connection between the methodology of reading the signs of the times alongside different views, with the option for the poor whose views need to be taken on board if we are to find novel paths for human fulfilment. This is somehow connected

with what Amartya Sen argues in terms of the enhancement of people's capabilities or freedoms, as will be discussed later. For Francis, the Church has a pivotal mission for the liberation and promotion of the poor, and 'for enabling them to be fully a part of society' (n.187). Expanding the anthropological basis of Paul VI with regard to "dignity, freedom, equality and participation", John Paul's Christological value of "solidarity" and "structural transformation", and Benedict's evangelical views of "justice and charity", the new Pope overtly explains why the option for the poor is not only fundamental for each Christian and for the Church (in fact the criterion of Christian authenticity), but also for human development in general (nn.193-216). Although he clarifies that the option for the poor is primarily a theological category and not a socio-political one (n.198), the Pope does not leave room for misinterpretations: spiritual conversion implies the seeking for social justice and for concrete solutions in the political and economic sphere, for which Christians need to be engaged without delay in fruitful dialogues in these areas, as this Thesis proposes.

Francis therefore not only accords great importance to the inductive-historical approach of social theological methodology, but also highlights the correlation between such methodology and the anthropological stress on freedom, inclusion and participation. An inclusive "seeing" of the signs of the time necessitates an inclusive dialogue, from which creative programmes fostering an inclusive society can ensue.

## 2.4. Conclusion

Jesus' teachings on loving our neighbours and enemies, on promoting reconciliation and justice, on the dignity of labour and the risk of wealth, among other social values, have been reinterpreted throughout the centuries by the Catholic tradition. This interpretation is necessary due to the on-going changes in the socio-economic and political realm. How to read the signs of the times in an inclusive way, with partners outside our specific tradition, and from below (i.e. from the reality of the most deprived), has been a question posed in Scriptures, epitomised by the parable of *The Good Samaritan*. Patristic and Scholastic theologians have led the way in answering. They have critically analysed their particular reality, discerned it in the light of the Gospel, and proposed a course of action that has helped to deal with issues such as the fall of the Roman Empire or the respect for American indigenous people. In the 20<sup>th</sup> century, Pope John XXIII, influenced by the Young Christian Workers movement, officialised CST method as an inductive and inter-disciplinary approach, which was later developed by Vatican II and the Latin American Magisterium. Paul VI furthered the anthropological basis of the method (human dignity understood in terms of freedom, equality and participation), emphasising also the need to



understand the social realm from particular contexts, which confirmed the Catholic theological opening to plural views, judgments and policies on social matters. John Paul II insisted on the legitimacy of pluralism and highlighted the contribution biblical values make to public plurality, as is the case on the assessment of the structures of sin. Benedict XVI addressed the Christological and Ecclesiological basis of and implications for the method, which was finally overtly confirmed by Pope Francis.

As Vatican II argues, if the Church needs to scrutinise the signs of the times, it cannot do so from an attitude of opposition to the world, but rather through its commitment to it. For that, human and historic ambiguities need to be acknowledged, particularly in alliance with partners who have expertise in those ambivalent realities. Once the reality is “seen”, CST can contribute to the “discernment” with Evangelical values, all of which are expected to result in calls for particular actions. The fact that this endeavour is not a simple task has been reflected in both the Latin-American and the Universal magisterium. We studied how the former issued a document negating the method, and how the latter have had serious theological troubles in supporting it whole-heartedly. Despite the difficulties, if this method is crucial for the social mission of the Church, as Pope Francis avows, it is worth exploring. With regard to social “analysis”, “discernment” and “change”, the Church does not need to fear and take refuge in its safe fortress of dogmatic truths. The truth of the Kingdom of God brought by Jesus Christ needs to be found in encounters with all people, in the daily activities everybody undertakes, and in the struggles to unknot what prevents human flourishing, particularly in political-economic structures. While the Church cannot undertake this endeavour on its own, it is expected that she can deploy its fundamental ethical role within the current processes of globalisation and help promote a culture of encounter with which to foster IAD. This Thesis, based on the CST methodology explained above, essays an encounter between social theology and Amartya Sen’s approach to economics in order to “see, judge and act” more effectively our socio-economic problems, starting from the ones affecting the most vulnerable of society.

### 3. CST methodology and the dialogue with social sciences

In the preceding sections we have seen how the method of ‘see-judge-act’ is rooted in the Christian Tradition, how it was developed within modern social theological-ethics, and how it was accepted by the official teaching of the Catholic Church. This chapter will question whether this method fosters or hinders the dialogue with economics.

*Firstly*, we will ask whether the “seeing” of reality is really an actual discernment of the signs of the times or a dogmatic or ideological reading. In addition, we need to analyse if the ‘seeing-in-context’ is actually a dialogical approach to consider the social realm, or if it is instead an individualised personal-driven analysis of the world. This is particularly important given that CST has always buttressed the “personal” principle with which the analysis of reality should start. *Secondly*, we will put to the test the “judging” in the light of the Gospel. The test will be threefold: First, does the Gospel have a social ethical content with which to judge reality, or is it more likely to promote individual ethics? Second, and in the event we can demonstrate that the Gospel does provide us with social ethical content, how can this content be relevant today, considering that modern society, its culture and the present global context are totally different from the times when the Scriptures were written? Finally, even assuming that the Gospel’s social ethical guidance can overcome the historical and cultural gap, how can this religious ethical guidance be applied in a non-Christian secular society? The threefold test will help us to analyse how faith-driven stories written thousands of years ago can be of any help to dialogue with modern economics. *Finally*, we will enquire if the proposals to ‘action’ can be compatible with secular economic proposals. Such enquiries will be limited to the methodological compatibility. Further analysis on which courses of action can be proposed when CA and CST are put into dialogue will be developed in Parts II and III.

#### 3.1. Reading the sign of the times

Although papal encyclicals<sup>67</sup> seems to acknowledge the role of social analysis and social sciences as crucial in order to interpret the signs of the times (*Laborem Exercens*, *Sollicitudo, Centesimus Annus*, *Caritas in Veritate*), sometimes they give the impression that such a role is not so much crucial, as rather secondary (Verstraeten 2005). For example, in *Centesimus Annus* (1991), John Paul II states that nowadays

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<sup>67</sup> Normally known as ‘Universal Magisterium’, as opposed to local magisterium. Yet, the use of Magisterium as a noun referring exclusively to the teaching of the Pope is highly problematic (Congar 1982, Mannion 2011), especially when applied to moral teaching (Selling 1998).

‘the Church's social doctrine focuses especially *on man* as he is involved in a complex network of relationships within modern societies. The human sciences and philosophy are helpful for interpreting *man's central place within society* and for enabling him to understand himself better as a "social being". However, man's true identity is only fully revealed to him through faith, and it is precisely from faith that the Church's social teaching begins. While drawing upon all the contributions made by the sciences and philosophy, her social teaching is aimed at helping man on the path of salvation’ (n.54).

Likewise, while Benedict XVI also recognised the importance of social sciences so as to interpret our society, in the very introduction of *Caritas in Veritate* he affirmed that ‘charity in truth, to which Jesus Christ bore witness by his earthly life and especially by his death and resurrection, is the principal driving force behind authentic development of every person and of all humanity’ (n.1). Moreover, in the conclusion of the encyclical he asserted that ‘without God man neither knows which way to go, nor even understands who he is’, and that a ‘humanism which excludes God is an inhuman humanism’ (n.78).

As Verstraeten (2005:95) explains, this kind of statement urges further clarification about the theological methodology, especially about the link between ‘theological interpretation and social analysis’. Without it, the argument follows, the method ‘seeing-judging-acting’ could easily be misinterpreted as doctrinal, thus deductive and disconnected from reality, rather than as a proper discernment, i.e. inductive and contextual. When this happens, dialogue with economics is closed.

In the case of John Paul, we have seen how he admits –though with some reservations- that social teaching is not merely doctrinal, since contextual discernments and the broader tradition of thought and action are also included, as occurred with the movement of Solidarity in Poland during the Communist regime. Indeed, the ‘reading’ of the process towards democracy of *Centesimus Annus* (1991) is underpinned by his personal experience and by that of the Solidarity movement (O’Connor 2005).<sup>68</sup> Moreover, in *Laborem Exercens* (1981), he proposes an actual phenomenology of work in order to get to the notion of human creativity and participation in creation, and to the conclusion that work is an expression of our freedom, though not merely to make more, but rather to become more (Weigel 2003). Furthermore, in *Sollicitudo* (1988) he linked the method of theological analysis with human free will and the societal participation of all people, and with the understanding of the present global interdependence as an asset to prevent selfish isolation and underdevelopment. Hence, a reading of social participation or the lack of it, according to John Paul’s teaching, cannot be made exclusively from a deductive methodology. Even in the *Compendium of the Social Doctrine of the Church* (2004), launched during John Paul’s last year in the papacy, a document whose methodology can be interpreted as deductive due to

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<sup>68</sup> As said in Chapter 1.

the explanation of CST through its 'principles', there is a call for refining the principles through rigorously empirical analysis and social dialogue (Weigel 2003:25). Furthermore, as we have previously explained, *Sollicitudo* continues with *Octogesima's* (1971:n.4) explanation about the responsibilities of Christian communities to discern options and commitments for socio-political-economic changes. This is a compelling suggestion to start from the particularities of communities in order to reach a proper discernment about social conundrums and accurate solutions to them.

In the case of Benedict XVI, despite his explicit exclusively Christocentric view of truth and human development depicted in the introduction and conclusion of *Caritas in Veritate*, in the same encyclical he explains that the driving force to find truth is called love, which means that every person regardless of her faith can be identified with it (n.1). Moreover, Benedict clarifies that this extraordinary loving force is the one which 'leads people to opt for courageous and generous engagement in the field of justice and peace' (ibid.). Hence, non-Christians involved in this kind of activity might find it easier to enter into a dialogue about the analysis of injustices and the proposals for such social illnesses. Furthermore, as explained earlier, Benedict's latest works showed a tendency in favour of an inductive, contextual and dialogical methodology when analysing social injustices. This tendency seems a confirmation that the dialogue with social sciences is not merely secondary when reading the signs of the times, as confirmed by Pope Francis (2013:182 and 2013c).

Once accepting the possibility of Catholic theology to read the signs of the times without an exclusive view and in historical context, we need to analyse how this reading is going to face the real ambivalence of history (Verstraeten 2005).<sup>69</sup> As the theologian and economist Mary Hirschfeld (2010) explains, historical and economic transformations and changes are not neutral. Hence, with regard to the socio-economic reality, the Church has the modern task of distinguishing what modern values are salutary from those which ought to be rejected in the process of such transformation (ibid.:166). For instance, 'secularism' and 'capitalism' are both present in our world in a way that could never have been imagined in the time of Jesus or in the Middle Ages. Both have brought some spiritual ills (e.g. exacerbated income inequality, materialism, individualism, etc.) as well as some real benefits (e.g. reduction in poverty, an outlet for human creativity, the advancement of sciences, etc.). Thus, the task of reading the signs of the times comprises an ethical dimension. The challenge for Catholic observers, however, is how to 'seek to apply the wisdom of ages past' taking into account 'the modern settings' (ibid.:166). As MacIntyre (1988) explains, we are also shaped by the modern settings of our era and our

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<sup>69</sup> See 2.3.2.

culture. It is here that God also speaks. Hence, it is not just a matter of judging modern realities from Catholic principles, as if those principles were not underpinned by modern values as well. What is at stake is a *reading* of reality that, while finding the newness of human development and God's revelation in the global *polis*, can match this newness with the human values learned throughout centuries by the Catholic Church. If this is the actual contribution that CST can offer to our society in these times (Hirschfeld 2000), then CST ought to dialogue with social sciences to fulfil its present mission, as this Thesis proceeds to do.

This way of reading the complex and ambivalent signs of history will better equip CST to unfold another dimension of its mission: the prophetic one. Ever since the time of the prophets, prophetic ethical judgement is twofold: (i) to publicly denounce injustices and miseries; (ii) to propose paths for enhancing creativity, wealth and human flourishing (Cowley 2004).<sup>70</sup> For that too, a dialogue with economics seems to be indispensable for CST.

## 3.2. Judging in the light of the Gospel

### 3.2.1. The New Testament social ethical content

In order to judge social concerns in the light of the Gospel, we need to question whether the Gospel provides a social ethical content with which individuals and groups can discern their social reality. This question is crucial for Part III, where we use the parables of the Kingdom in order to set up the dialogue between CST and CA. The literature is extensive and we have tried to focus only on the most relevant issues for this thesis.

Although CST has championed recognising social ethical teachings in the New Testament, serious rival arguments have been proposed throughout the 20<sup>th</sup> century.<sup>71</sup> Troeltsch (1911), Bultmann (1934), Cadbury (1937) and Niebuhr (1956; 1957), among other experts, argue that Jesus' ethical teachings, in contrast with those of the Old Testament, are more focused on the behaviour of the individual rather than on social problems. The New Testament ethics is more on love, conversion and interpersonal relationships than on political-economic transformation. For these academics, therefore, to invoke the Gospel when analysing society is, at least, theologically

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<sup>70</sup> For an account of Vatican II position on this topic, see 2.3.2.

<sup>71</sup> In the early twentieth century, Bible scholars such as Johannes Weiss (1863-1914) and Albert Schweitzer (1875-1965), argued in favour of the centrality of 'the kingdom of God' and its eschatological nature with regard to New-Testament ethics. However, according to these scholars, given that the Kingdom of God in its Judaic context did not arrive in the way people expected, nor in the form explained by John the Baptist and Jesus, the ethical teachings derived from this notion 'had to be either dismissed as part of a tragic mistake or reinterpreted in light of the nonappearance of the kingdom' (Harrington 2002:10). Within this line of thought, Bultman proposed to demythologise 'the apocalyptic imagery associated with the kingdom of God in the early Jewish texts and the Gospels' (ibid.). For Bultman, therefore, Jesus' ethical teachings are just examples of how to respond to God, but are by no means timeless truths to be followed in every situation' (ibid.). In other words, according to Bultman, Jesus does not really teach ethics, but how to develop a relationship with God.

inappropriate, an argument widely accepted among liberal economists.<sup>72</sup> If this was true, CST methodology of judging socio-political reality in the light of the Gospel would hinder an interaction with Amartya Sen's economic approach in order to promote human development.

However, evidence of an ethical social content in the New Testament abounds, as modern Christian theology has demonstrated. This dissertation cannot address this vast biblical discussion,<sup>73</sup> basically focused on the continuity or discontinuity of the idea of social liberation contained in the Old Testament.<sup>74</sup> Still, following Mott (1987 and 2011), it can be attested that the newness of Christ does not blur the Old Testament 'concern for the social order, for justice, for the economy and social relationships of the powerful and the weak' (Mott 1987:228). Even when recognising that there is something 'new' in the coming of Christ, a novelty which obviously breaks with the Old Testament teaching, such newness does not seem to eliminate the social teaching inherited from the Old Testament, but rather further advance it, in which case the argument against an ethical social content in the New Testament is discredited. This social ethical continuity between both Testaments has been demonstrated in several ways,<sup>75</sup> five of which have had special relevance to the literature: (i) the structures of the synoptic Gospels, which offer the context of their texts, clearly underlining social ethical issues; (ii) the use of John the Baptist by the four Gospels as the nexus between both Testaments strengthens the idea of a continuity-novelty regarding social prophecies; (iii) most of Jesus' speeches, in particular the programmatic ones and the parables of the Kingdom, have direct references to social justice; (iv)

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<sup>72</sup> An apposite illustration in *The Times* editorial for Christmas 2011, interpreting the thoughts of Reinhold Niebuhr, stated that the Incarnation of Christ, i.e. God becoming man, has blurred the distinction between the material and the spiritual, and therefore priests should not preach against consumerism during Christmas time. The editorial argued that a spiritual attitude towards Christmas is not at variance with a material one, thus worshipping Christ is not at odds with partying and buying presents or even going shopping. What is more, the argument continues, a consumerist attitude could well help the present economy, lifting it from its current depression.

<sup>73</sup> The Bible –the New Testament included–, is in fact a collection of books (*biblia*) with no single biblical position on different matters. 'Rather, there is usually a variety of perspectives, often depending on the historical circumstances. This makes an ethical interpretation based on the Bible more difficult. For example, one cannot easily harmonize Paul's directives to respect and cooperate with the officials of the Roman Empire (see Rm 13:1-7) and the scathing critique of Roman officialdom and of the emperor cult in the Book of Revelation' (Harrington 2002:12).

<sup>74</sup> For the social ethical content of the synoptic Gospels, see Mott (1987; 2011), Brown (1997), and Donahue and Harrington (2002) for a specific explanation on Mark. For social ethics in the Epistles of the New Testament, see Rauschenbusch (1964), and Dunn (2006) for the letters of St Paul. For a discussion on the Johannine literature and its reference to social ethics, particularly through the concepts of ἀγάπη (agape=love) and ἁμαρτία (hamartia=sin), see T. Johnson (1995) and Brown (1982). For an analysis of how the Book of Revelation (Rev.) is related to social ethics through the denunciation of idolatry in politics and economics, see Court (1999). For a thorough study of the socio-political implications of the notion of salvation-redemption contained in Rev., see Schussler-Fiorenza (1985).

<sup>75</sup> For a further discussion on the sources of Christian tradition with regard to the promotion of social change, see Haughey (1977).

even the Gospel of John, whose core message is, arguably, not on social justice but on grace, glory and love, if read alongside the rest of the Johannine books (epistles and Revelation<sup>76</sup>), cannot be detached from worldly socio-economic problems; and (v) St. Paul's<sup>77</sup> and other epistles, particularly James',<sup>78</sup> also have strong connections with social righteousness.

According to the referred literature, there is enough evidence that the social ethics of the Old Testament is not only included but also perfected with the coming of Christ, and that socio-ethical considerations that go beyond the Jewish cultural tradition do have the germ of God's revelation in the Old Testament.<sup>79</sup> Still, even accepting the social ethical content of the New Testament, we need to examine to what extent such content can possibly be relevant for our present society.

### 3.2.2. The relevance of the social Gospel for today

A first usual objection to the use of the New Testament's social ethics is about specific or concrete commands (Mott 1987:238). Given that those commands were expressed within a completely different social culture, especially the economic one, when applied literally today they cannot but generate unsafe conclusions, bewilderment among believers, and a profound divergence from the rest of society. For instance, Christians often viewed as 'perfectionists' may champion certain commands such as turning the other cheek in order to foster an individual virtue despite social and cultural difficulties. By so doing, they might somehow tolerate, if not implicitly support, unjust social situations. They can also underline the command of selling one's

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<sup>76</sup> For Schussler Fiorenza (1985), the symbolic universe of *Rev.* is a fitting response to its socio-political "rhetorical situation". 'It seeks to alienate the audience from the symbolic persuasion of the imperial cult, to help them overcome their fear so that they can not only decide for the worship and power of God and against that of the emperor, but can also stake their lives on this decision' (ibid.:6). When a political-economic situation is characterised by injustice, suffering and oppression, Christians and all peoples and nations are called to be the 'eternal gospel' (ibid.), this means, the good news that power can be used to liberate rather than to oppress people, that economics can buttress communion rather than division; in short, that justice is possible regardless of the terrible conditions a community might be experiencing, whether ad intra or ad extra. For similar interpretations, see Ellul (1977) and Vanni (2010). For a contrasting analysis, see Yarbrow Collins (1976).

<sup>77</sup> Rauschenbusch (1964) and Mott (1987) have well illustrated that although Paul's letters do not comprise much social teaching, he is not apathetic towards social concerns, as is generally assumed.<sup>77</sup> Paul understands human justice as a response to divine justice, just as our grace corresponds to God's grace. In 2Co:8-9 'after encouraging the Corinthians in their collection for the poor... Paul reminds them of God's justice for the poor' (ibid.). This is in total consonance with the OT notion of justice, which Paul explicitly quotes by referring to the iconic psalm 112: '*God distributes, God gives to the poor. God's justice last forever. He, who supplies seed to the sower and bread for food, will also supply and multiply your seed and cause the harvest of your justice to increase*' (Ps 112:9-10).

<sup>78</sup> For Rauschenbusch (1964), it comes as no surprise that the Epistle of James, due to its social emphasis, has been excluded from the more liberal Lutheran tradition. For Luke Johnson (1995), this epistle is closely related to Leviticus 19. For example, the condemnation of holding back the workers' wages in James (5:4) reflects Lv 19:13; and the command of loving one's neighbour as oneself (2:19) resonates with the whole chapter and context of Lv 19, where partiality is condemned.

<sup>79</sup> For the particularities of the newness of Jesus' testament in contrast to the Old Testament, see Harrington (2002).

property to give it to the poor as a way of personal charity, hoping that this will produce a social effect and, in the case that it does not, God will recompense, at the end of time, those who were generous and condemn the selfish ones. Yet, they do not consider the current social contexts that foment poverty, nor the process of wealth production, nor the subtle differences of 'doing charity', nor do they question whether generosity or philanthropy is the only means to compensate social disparity.<sup>80</sup> By applying these texts without their own grammatical, theological and sociological context on the one hand, and by bypassing our sociological context on the other, the reading in the light of the Gospel becomes a nebulous methodology, inimical to modern sensibility, and, ultimately, seemingly impossible.<sup>81</sup>

Similarly, some Christians often self-proclaimed as 'traditionalists', tend to use some ethical material of the New Testament as the basis of social ethical tradition, the problem being that such material is not considered within the context of the entire New Testament (Mott 1987:238). For example, they take some explicit instructions regarding the participation of women in the churches to negate any gender approach within the Church, with inevitable ethical consequences for discussing –at least theologically- gender issues in the social realm; and this is despite the promotion of women in the Gospels, particularly in Luke.<sup>82</sup> They can also take Paul's teaching of the good servant-slave to bolster an individual virtue that ignores social oppression, whilst disregarding Paul's context about truth and freedom (Gal 5), nor considering the Synoptic emphasis on Christ liberating people from all sort of oppression. Occasionally the intention lying behind this approach is to translate the old texts into modern language in order to provide a present meaning for modern readers, as it is the case of Reicke (1964). His translation of 1Pe 2:18 has generated fierce academic controversies among moral theologians.<sup>83</sup> By translating the Pauline category of 'slaves' into 'workers', he argues, readers can make sense of the text in times when slavery as a legally and morally accepted institution no longer exists. Hence, the phrase *you workers, be submissive to your masters with all respect, not only to the good and reasonable ones, but even to the difficult ones* is used to propose a model of sanctity based on the suffering Christ, who has not striven after personal liberty or antisocial behaviour or opposition to the existing order. However, this ethical teaching can instil a divided spirituality with regard to

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<sup>80</sup> In Part III (Chapter 11), and based on the Parables of the Kingdom, we analyse the difference between generosity or philanthropy and the logic of gratuitousness within economic transactions.

<sup>81</sup> In *Evangelii Gaudium* (n.177), Pope Francis explicitly argues in favour of a social content of the Gospel. When referring to charity and solidarity, he avows that Biblical texts do mean 'to eliminate the structural causes of poverty and to promote the integral development of the poor', which by no means implies diminishing the importance of daily acts of solidarity when meeting with the real needs of those around us (ibid.:188-9).

<sup>82</sup> For the role of women in the Gospel of Luke, see Maly (1980), Kopas (1986) and Reid (1996).

<sup>83</sup> See for example Reicke (2001), an edited version by D. Moessner and I. Reicke, where some discussions around Paul's letters are addressed.



individual flourishing and social justice,<sup>84</sup> seemingly irreconcilable with the New Testament message (*Evangelii Gaudium*, 179).

Likewise, and in the opposite spectrum of Christianity, Christians often referred to as 'progressive' may take some parables of the Kingdom to promote social liberation, while blurring the context of personal love and peace that cannot be taken just as an auxiliary teaching of Jesus' message, as Niebuhr (1957) explains in detail. The New Testament has indeed an emphasis on personal conversion, stressing interiority and the total person. Such conversion, based on the grace received from God, is expected to change the way individuals relate to each other and to God. Although many scholars agree with the fact that such conversion has ultimately also a social and even cosmic dimension, the personal emphasis cannot be omitted (Curran 1972:35). As Pope Francis has clearly explained in *Evangelii Gaudium* (nn.189,205), there is an intrinsic connection between personal evangelical convictions/attitudes and the seeking for structural justice; between micro-relations (e.g. family, friends) and macro-relations (e.g. politics, economics, the environment).

The question of these uses of Scripture to read our present social problems is one of hermeneutics.<sup>85</sup> As Curran (1985:32) points out, most biblical scholars acknowledge there is a cultural and historical limitation to the texts of the Scriptures. Therefore, biblical texts 'cannot be wrenched from their original context and applied in different historical and cultural situations without the possible danger of some distortion. What might be a valid and true norm in biblical times might not be adequate today'. Thus, it is theologically invalid to apply biblical texts to social ethics without refinement regarding the literal context, the cultural and historical context, and even the ethical goals or ideals depicted in the texts (ibid.). One of the main contributions of biblical renewal is to recognise the historical and cultural limitations of the texts on the one hand, while opening the text to new interpretations among the Christian community that lives in a different cultural and historical time on the other (ibid: 35).

Although this biblical contribution has enriched Catholic moral theology, the latter subject also offers its caveats regarding the use of Scriptures when applied to moral concerns, especially to social issues (ibid.:37). Apart from the perennial danger of using the Scripture as proof text to confirm arguments based on other sources of research,<sup>86</sup> moral theologians have warned about the danger, among others, of: (i) omitting the eschatological influence of some texts (ibid.:39-41); (ii) emphasising some themes over others without clear biblical grounds; (iii) arbitrarily selecting

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<sup>84</sup> See also Reicke (1964) and Curran 1972:38-9.

<sup>85</sup> For a thorough explanation on hermeneutics or the art of interpreting, see Gadamer (1989).

<sup>86</sup> Vatican II has disregarded this way of using the Scripture (see Chapter 2).

texts in order to read into them particular social problems; and (iv) being unaware of the ethical presuppositions of the reader (*ibid.*: 41-43; Schnackenburg 1991). It is beyond the purpose of this chapter to analyse these caveats. Still, they depict some limitations to the use of the Scriptures when applying them to read the signs of the times. On the one hand, a proper hermeneutic cannot avoid taking these limitations on board at the risk of invalidating the whole methodological process. On the other hand, these limitations evidence the need for an interaction with other ways of understanding reality, which validates the purpose of this thesis, intending to promote a dialogue between CST and the CA. Nonetheless, biblical hermeneutics is not, as some scholars suggest (Mott 1987:238-9), negating the authority of the text or Christian faith in itself, but rather devising a way of applying Scriptures to social issues in the light of the core of the New Testament on the one hand, and proposing a solution to the understanding of the texts in different cultures on the other.

Acknowledging the need for proper hermeneutics is just a partial answer to the objection about the relevance of the social ethics of the New Testament in our present society. Although it does respond to the concerns about the particular commands of Scripture, the question about what New Testament ethics can offer to the current social debate is still pending. To address this issue, and following Gustafson (1970) and other ethicists (Childs, Curran, Kelsey, etc.<sup>87</sup>) who have reflected on the different aspects of ethics, it can be argued that social ethics goes beyond decision-making, comprising also: (i) the moral assessment of current practices and attitudes; (ii) the way of motivating people to contribute to a good society; and, (iii) the task of stating social aims with which social reforms are to be forged. The New Testament contribution can rely on these aspects of social morality. This means that the Gospel can:

- (i) shed light on judging the state of affairs and on the perception of reality based on what social relationships are meant to be. Loving, compassionate and non-violent relationships are crucial for the understanding of society in the light of the new social order that has broken into history through Christ (Mott 1987:239);
- (ii) shed light, through thorough analysis of the Scriptural texts,<sup>88</sup> not only on the way of understanding reality, but also on how to respond to it, particularly when lack of motivation and imagination prevails. For example, the way faithful communities and movements re-read the Scriptures can help not only to clarify that, for instance, extreme inequality is a recurrent evil that starts with indifference to our neighbours

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<sup>87</sup> During the 1970s, James Gustafson studied ethics from a theocentric and broad Christian (mainly Protestant) perspective, while James Childs (1978) did it from an anthropological Lutheran view, George Kelsey (1973) from a Baptist one, and Curran (1972) from a Catholic position.

<sup>88</sup> For more on the significance for Catholics of the Scripture as the Word of God (revelation), see Chapter 1.

(Lk 16:19-31), whether impure or oppressed by demons (Lk 4:31-37. 38-39; 5:12-16; 8:26-39.43-48; 9:37-43), sick (Lk 4:38-41; 7:1-10; 8:40-42.49-56; Lk 14:1-6); paralytic (Lk 5:17-26), adversaries (Lk 6:27-42), excluded (Lk 8:26-39.40-56; 17:11-19; 18:9-14; 19:1-10), wounded (Lk 10:29-37), relatives (Lk 10:38-42), poor (Lk 12:16-21; Lk 17:19-31; 18:1-8), lost (Lk 15), indebted (Lk 16:1-8), vulnerable (Lk 18:1-8.15-17); etc. It can also motivate them to find new ways of responding to social ills, however limited those responses might be. This motivation is based on the New Testament ethic of response to God's love in Christ (Mott 2011:Chap.2) or what is theologically known as 'Grace'.<sup>89</sup> 'The response is of gratitude and also of empowerment' (Mott 1987:240), fostering our deep identity, characteristic attitudes, dispositions and fundamental interests (Curran 1972:64). In fact, as Schackenburg (1991) argues, there is an inextricable connection between the content of the New Testament and the motivation for action as part of the coming of the Kingdom of God in Christ;<sup>90</sup> and

- (iii) provide guidelines for basic goals or help to discern the list of social priorities in consonance with the inclusiveness of Christ's social legacy (ibid.).

Although debatable, these contributions may well be of great interest to our present global society, which, for example, does not seem to find a solution to the social ills generated by the present financial system (Stiglitz 2013). The reconstruction of such a system or the devising of a different one will depend on the creativity and empowerment of current citizens (Green 2008). Christians judging social concerns in the light of the Gospel can help in this regard.<sup>91</sup>

### 3.2.3. Christian views in a non-Christian society

#### *Secular objection*

Having explained why the New Testament has a relevant social ethical message that, with an appropriate hermeneutics, CST can propose to evaluate social concerns in order to find solutions to actual injustices, one can still contend that it is precisely this evangelical-religious insight of CST which precludes it from dialoguing with the secular world. Two common objections are heard, one secular and another theological. The first one argues that social thoughts have dramatically changed since the time the Bible was written, a gap which is as great as the one existing between

<sup>89</sup> For a comprehensive understanding of Grace in the Spanish literature, see Sayés (1993), Ruiz de la Peña (1991:267-406), Ladaria (1997:231-295), Ganoczy (1991), Meis (1998), Flick y Alszeghy (1989). We will resume some aspects of the theology of Grace in Part III.

<sup>90</sup> Further explanation about this 'motivation and empowerment' is provided in Part III.

<sup>91</sup> Part III discusses whether CST can contribute to the understanding of the notion of development/freedom, and wellbeing/justice. It argues that biblical notions of distributive justice, of human nature and of history are crucial to such a contribution.

the human and the divine (Preston 1976). Despite modern hermeneutical approaches, any social ethics based on the Bible is not only grounded on a different mind-set from the modern one, but also depends on religious principles. At their best, those principles are faith-dependent, thus inapplicable in communities driven by non-faith standards or other faiths; at their worse, such religious principles are fundamentalist, thus enemies of a modern democratic secular world.

In order to respond to this common objection, Christian scholars have tried different sets of arguments, the main one being based around the universal core-message of the Gospel. Mott (1987:248) claims that despite important contrasts between modern and ancient times –which ought to be considered in a serious social analysis, the Gospels deal with ‘perennial dilemmas of human social existence’, such as issues on ‘power’ or on ‘oppression of the powerless by the powerful’, a recurring social flaw in the organisation of societies. Thus, given that the social teaching of the Gospel is always informed by human experience, particularly troubles caused in organising common life, biblical principles can be easily understood and applied by non-believers seeking social solutions. One condition still applies: when implementing biblical principles to social concerns, interpreters, regardless of their belief, cannot bypass accurate hermeneutics –as explained earlier.

However, as Schneiders (1991) argues, accurate hermeneutics does not mean that non-believers using the Bible have to follow a particular theological school of thought. It rather means that they need to respect what is ‘behind the text’ and what has been ‘before the text’. What is behind the text has been studied by experts who have tried to decipher them (exegesis), meaning to discover the historical, linguistic, psychological, sociological and theological background of the text and its author/s. But this is only a first stage. A proper hermeneutics needs also to consider what the text has produced throughout centuries to those reading it as a revelatory text (ibid.:133). By respecting this twofold process of interpretation, the interpreter will be able to recognise the text as a mediator between social principles included in the Bible, and social problems existing in societies where Christians have been living.<sup>92</sup> This can be extremely helpful for a better understanding of social reality, especially in societies with a Christian background. In addition, this interconnection with the revelatory text allows the reader to discover how the biblical texts have opened to readers ‘a word of possibility’, this means, new

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<sup>92</sup> As mentioned in 2.1, and as further explained in Parts II and III, Sen (2009:170-173), who is a non-Christian and a self-proclaimed agnostic, uses the *Parable of the Good Samaritan* (Lk 10:25-27) to illustrate how justice includes values such as responsibility towards strangers, which he then connects with enhancing freedom and agency in a global context. As a serious scholar, it comes as no surprise that his hermeneutics does not ignore what is behind or before the text.

ways of being (ibid.:148), and how such texts are able to open to new possibilities in the present social realm.

An analogy can help us to understand this point. Texts on social biblical teaching can be introduced, read and applied as great art. As Janzen (1973) explains, great art often transcends the limitation of its historical context, because it often addresses the enduring aspects of human existence. Following Gadamer (1989), Ricoeur (1981) and Tracy (1981), biblical scholar Sandra Schneiders (1991) offers a compelling explanation for treating biblical texts as great art. She argues that these texts are 'not merely a transcription of oral discourse' nor just a display of the writers' sensibility, but rather structured pieces of writing 'according to the code of some literary genre in interaction with the author's own style', which in addition intend to engage the reader with the truth they bear (ibid.:148). Therefore, these texts can be considered as great art not merely because of their aesthetic or linguistic quality, but most importantly because of their iconic significance. While the former consideration can lead us to address the texts as an *art object* (Gadamer 1998), the latter permits one to consider them as a *work of art* (ibid.). This means that the biblical texts can be treated as great art both because of their structured literary composition and their interaction with an interpreter. Gadamer illustrates how, in contrast with spoken discourses, whose actual meanings are just 'intermittent' because they cease when the speaking event ends, written texts have the capacity to endure as an art object, that is, its 'ideal meaning' (the meaning portrayed by the author), can endure even when 'the event of communication is in abeyance' (Schneiders 1991:148). When applying this argument to the Bible, it can be stated that the ideal meaning of biblical texts, when being interpreted by modern people, is actualised, renewed and furthered, opening for the reader new ways of understanding his/her own reality. Therefore, as Schneiders argues,

even though biblical revelation in the strict sense of the term is an event of interaction between God and the human reader mediated by the text, one can speak of the revelatory text even when it is not being interpreted, the way one can speak of Mona Lisa as a great painting even when it is not being contemplated (ibid.:149).

Considering biblical texts as great art permits the use of artistic analogies (visual, auditory and dramatic) for understanding them better and for applying them to universal human experiences. **Visually**, the biblical text can be referred as a "verbal icon" (Ricoeur 1976). An icon 'in the Eastern religious world is not merely a representational painting or an abstract expression but rather a highly stylized symbolic re-presentation of a mystery' (Schneiders 1991:149). Through a combination of traditional colours, forms, and motifs, the icon mediates between the particularity of the image and the universality of the mystery intended to be communicated, encouraging the viewer to move from her intimate and personal experience of the seeing,

towards a transcendental and unknown experience when connected with the mystery the icon contains. Schneiders argues that

the biblical text, especially the gospels, has this same character. Each of the gospels takes up the traditional stories, motifs, and sayings of the Jesus tradition, constructs them into an artistic whole, and holds them before the reader in such a way that the transcendent mystery of the Christ shines forth in the particularity of the Jesus of history (ibid.).

**Audibly**, the text can be addressed as a 'musical score', which rather than actual music is the normative possibility of music (Gadamer 1989). The musical score shines when the music is played. Although interpretations are never identical one to another, they still need to follow the normative score in order to be valid or be considered good. Following such a score is the only way in which different interpretations can resemble the actual identity of a piece of music. For Schneiders (1991:149), this also applies to the Bible:

The text is not itself the Gospel. It becomes actually revelatory only in the act of interpretation. Although the interpretations are numerous and various, they are normed by the text, by the ideal meaning built into the text by the act of composition. Note, the ideal meaning is not equivalent or reducible to (although it includes) the "intention of the author" but is the effect of composition, of the structuring of the text into a literary work. As any writer knows, a literary work may exceed or fall short of authorial intention but rarely is it perfectly coterminous with that intention.'

**Dramatically**, the text is like a play, 'a drama whose script allows it to be performed repeatedly and in an endless variety of interpretation' (ibid.: cf. Gadamer 1989). A play has the attribute of being able to generate a different world from the players, a world created through their roles. Should they fail to enter into this new dramatic world, the spectators would easily notice it and the play would fail altogether. But when they succeed in this endeavour, the play generates a new world not only for the players, but also for the spectators. In the case of biblical texts, Schneiders argues, they also create

a world with its own dynamics, and the interpreter is drawn into this world to find her or his identity in a reality that challenges, that sometimes even replaces, the reality of "this world". When the world of the Gospel so becomes the world of the reader that she or he becomes permanently "part of the play" we speak of conversion. (ibid.:150)

Note that the analogy is with 'great' art only. We are aware that not every piece of writing is a work of art, and even some of those which are considered art have had little influence on people. Following Ricoeur (1981) and Schneiders (1991), we can define great written art as those texts having at least three features: (i) aesthetic beauty in their style and composition; (ii) steady relevance throughout the centuries (not merely a few years or decades); and (iii) lively permanent effective interaction with a large group of readers. This is what is normally known as

a 'classic text', a text that belongs to the human heritage and whose characteristics are of universal significance.<sup>93</sup> Although all classic texts are influenced by their cultural tradition, it is precisely through the sensibility of a particular culture that this great piece of art is able to bring universal truths to human existence. The classic,<sup>94</sup> unlike other texts, 'is not imprisoned in its culture' nor in its generation, but is rather alive among different cultures and times through the effort of readers who, apart from criticising and translating it, appropriate it and re-contextualise it in their current situations (ibid.:150-1). Indeed, 'the classic text is classic... because it does not merely convey information but affects existentially the life of its readers' (ibid.:151).

In this regard, as we speak of Latin classics, Greek classics or Chinese classics, we can also speak of Christian classics, among which 'the New Testament is *the* religious classic of Christianity' (ibid.:151). Its aesthetic style, its constant relevance for millions of people throughout twenty centuries, and its capacity to effectively affect the lives of its readers, especially by offering them a new set of possibilities for their well-being, makes this religious book a truly classic. Any social analysis disregarding this book just because it is 'religious' will not do justice to its significance, not only in ancient but also in present societies. Yet, the New Testament -and the entire Bible- is more than an interesting religious book to take into account while analysing social behaviour. As Verstraeten (2005:101) explains, its stories are more 'than a reservoir of citations used to illustrate moral insights'. They are rather 'historical testimonies', not merely of Judeo-Christian thinking, but also testimonies of communities which, helped by 'the continual remembrance of the biblical narratives in liturgy or memorializing celebrations' (ibid.:101), had interpreted the signs of their era, especially during tough times. By so doing, the biblical narratives enabled them to discover semantic innovations, disclosing previously unknown hermeneutical horizons (ibid.:102). These stories, indeed, have the capacity to generate new energies, to find alternatives to the unjust state of affairs, to promote social change even in societies that did not share their religious values.<sup>95</sup> They do not tell us merely something about the past, but also open a new world of meaning (*Sollicitudo*, 54), offering 'generative metaphors' that contribute to a novel vision of the present (Verstaeten 2005:102).

In times when economics cannot give creative answers to financial and environmental crises on its own, bible stories can provoke readers, not only to rethink the text in itself, but also to rethink the world. They can break the present narrow hermeneutic horizon or biased interpretation of wealth creation by opening new alternatives (Schneiders 1991:148), and they

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<sup>93</sup> In this regard, Sen uses Sanskrit poems and some biblical texts in his work (see Part II).

<sup>94</sup> For a thorough analysis of the category 'classical' as key to hermeneutics, see Tracy (1981:99-229).

<sup>95</sup> This topic is furthered in Part III.

can challenge root-metaphors, those basic modern assumptions used to depict (and distort) the nature of society and our experience (Verstraeten 2005:106), such as the exclusive utilitarian-ridden intention for decision-making, or that unregulated markets will forge justice and spread wealth (*Evangelii Gaudium*, 204).

### *Theological objection*

A second and more theological common objection to applying CST with its biblical grounds to a present socio-economic dialogue can be found in matters concerning eschatology.<sup>96</sup> Sanders (1975) deprecates a New Testament approach to social ethics because, he argues, the imminent coming of the Christ underlining its texts, has never occurred. Thus, when confronting social ethical dilemmas, 'we are now at least relieved of the need or temptation to begin with Jesus, or the early church, or the New Testament, if we wish to develop coherent ethical positions. We are free from the bondage of that tradition' (ibid.:130).

Mott (1987:249-251) has responded with two sound arguments. First, Sanders misinterprets completely the essence of the eschatology of the New Testament, because it is not merely about an immediate coming, but most importantly, about the tension between the second coming of Christ and the first one, i.e. between the 'already' and the 'not yet', between what the irruption of Christ in history has already done and how things will be perfected at the end of time. In fact, the danger with eschatology is to loosen the tension between the present and the future, between the already presence of Christ and its consummation.<sup>97</sup> Thus, a further delay in the second coming of Christ does not alter the principles of social ethics nor does it prevent them from interacting with different creeds or with secularised social views. It is precisely that 'tension' that encourages Christ's followers to find new creative ways of applying the Gospel's social teachings, regardless of the time that has passed since the first coming of Christ, regardless of when the last coming is going to happen, and regardless of the beliefs of present society. Given that the social principles of the Kingdom of God inaugurated with Christ aim at promoting the most peaceful, harmonious and inclusive way possible of living together, eschatological

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<sup>96</sup> From the Greek *eschatos*, the last. Generally speaking, it refers to the formation of ideas about the end of life, or the end of the world. In Christian theology, it also refers to the last judgment and resurrection (Oxford Dictionary 2005). For an introduction to Christian eschatology, see O'Callaghan (2011). For more on biblical eschatology, see Schussler-Fiorenza (1976).

<sup>97</sup> As Schussler-Fiorenza (1985:5-6) explains, among the New Testament books, *Revelation* is actually an attempt to correct the over-emphasis on the future coming of Christ that early Christian communities had, a correction crucial, not merely for the understanding of a balanced 'eschatology' (between the 'already' and the 'not yet'), but also for the encouragement of persecuted Christian communities who, alongside non-Christian communities, hunger and thirst for justice. For the author of *Rev.*, history and eschatology do not differ, 'since the resurrection and enthronisation of Christ marks the beginning of the eschatological end time. All Christian time and history is "end time"' (ibid.).



objections do not seem enough to discard what could be taken as a valid contribution to a pluralistic society from believers in Christ, even if their contribution is in competition with others. Conversely, biblical eschatology promotes dialogue with other creeds, whether secular or religious,<sup>98</sup> in finding such a way of promoting actual communion among societies and groups. This leads us to the second argument deployed by Mott.

Eschatological objections also neglect 'the great number of contemporary Christians for whom the imminence of Christ's return plays an important part in their sense of urgency in mission' (Mott 1987:250). By so doing, they are ignoring ethical motivations that are crucial to understanding why people behave in one way and not in another, and why their notion of development/freedom and justice/wellbeing is perhaps different from the mainstream economic one. This omission will certainly be a flaw in the liberal-postmodern argument for social organisation. Moreover, as Ogletree (1983) explains, communities whose members have the sense of 'participating' in the transformation of society are better motivated to confront the social ills and structural problems than members of communities who do not have such participatory feeling. When this sense is additionally grounded in some kind of hope for somebody or something to come, members of such a society usually generate alternative ways of social life. Therefore, a biblical eschatological approach not only does not impede interaction with the secular world, but it is also a contribution to the understanding of the world altogether. Indeed, such a notion of transforming society through a novel participatory attitude based on hope, can also 'be applied to the greater society and discern genuine eschatological tendencies in secular movements' (Mott 1987:250).

To sum up this section (3.2.3.), neither the eschatological nor the secular objection to reject biblical principles when analysing society prove to be consistent. We have attested that a well-balanced Christian eschatology helps to analyse social problems in dialogue with other views, encouraging a participatory approach that can easily be matched with some economic proposals such as Sen's. On the other hand, biblical classic texts, when seriously interpreted and applied to modern social analysis by CST or its partners -whether religious or not, open new ways of understanding reality and deliver new visions of being, and of being well.

Similarly, as examined in the previous section (3.2.2.), the fact that the New Testament includes specific commands which refer to ancient social situations is a weak argument when rejecting the application of CST's biblical principles when analysing socio-economic realities. The appropriation of the text requires a critical analysis of the particularities of those

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<sup>98</sup> For the importance of the dialogue with science, and the ecumenical and inter-faith dialogue when seeking social justice, see *Evangelii Gaudium* (nn.242-254).

commandments, not to repeat them literally, but rather as the basis to re-contextualise them. Through this thorough and dynamic process of hermeneutics, biblical texts -and CST principles relying upon them- can shed light on the perception of reality, on the seizing of human motivations for social action, and on the discernment of how to proceed in concrete circumstances.

Finally, as demonstrated in the first of these three sections (3.2.1.), preventing the dialogue between CST and present economics, on the basis that the New Testament has no actual social teaching, is theologically unacceptable. The structures of the synoptic gospels, the mediation of John the Baptist, Jesus' first public speeches, the parables of the Kingdom, and other theological features of the epistles of Paul, James and the Johannine literature, is enough evidence to assert that the social message contained in the Old Testament is incorporated and furthered in the New Testament.

Assuming we have demonstrated that the proposal of CST on the *seeing* or reading the signs of the times requires a dialogue with social sciences -particularly with economics (3.1), and that the *judging* in the light of the Gospel is compatible with modern pluralistic societies (3.2.), it is time to move on into the third and last section of this Chapter 3 and to question if the 'action-proposals' of CST methodology can be compatible with secular economic proposals like the CA.<sup>99</sup>

### 3.3. Acting: promoting justice

The third part of the triple method 'seeing-judging-acting' appears to be the least problematic regarding the methodological compatibility between CST and CA. *Prima facie*, there is no theoretical difficulty whatsoever in accepting proposals coming from the two first stages of the 'seeing' and 'judging'; the reason being, that there is no possible way to know beforehand the outcomes of an interdisciplinary 'seeing' and of the broad and always afresh 'discernment' based on the Bible.<sup>100</sup> Yet, criticisms could follow when concrete proposals are pushed through. Theologians can argue that the eventual proposed policy does not actually match with the teaching of the Church; economists can distance themselves from proposals which they consider materially unfeasible; and politicians may express strong opposition to proposals based on religious beliefs, arguing that religious views should not interfere with a pluralistic secular society. Let us briefly examine these theological, economic and political concerns.

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<sup>99</sup> Further analysis on which courses of action can be proposed when CA and CST are put together in dialogue will be developed in Part II and III.

<sup>100</sup> In Part III we attempt to reflect the fresh discernment derived from some parables of the Kingdom in alliance with Sen's capabilities approach.

### *Theological objections*

Meticulous and rigorous *theologians* need not fear proposals for action which are founded on interdisciplinarity. Firstly, those practical recommendations cannot be attributed exclusively to Catholic theology, thus they do not necessarily need to be totally in consonance with Catholic theological orthodoxy. Besides, public outcomes from a dialogue between a Catholic and a non-religious approach can be considered within the strict Catholic orthodoxy as the 'lesser evil'. This was the case, for example, with the law of divorce passed in January 2004 in Chile. After an intense public debate, the Conference of the Bishops of Chile addressed the result as the least possible evil for that particular moment. Before the Bill was passed by the Congress, the bishops' lobby suddenly shifted from an absolute opposition to any divorce law, to the acceptance of a moderate divorce law. Such a law, they admitted, may still include compulsory mediation stages, strong barriers to a divorce requested by one side only,<sup>101</sup> and the right to exercise freely the option for a religious and indissoluble marriage.<sup>102</sup>

Secondly, theologians should remember that it is the aim of CST to promote Christian values in spheres such as economics, but by no means does CST intend to dictate which economic paths a society must take (*Octogesima*, 4). To offer social values grounded in Christ and His love for all humanity is a service that the Church can offer to the modern world, but it should not be interpreted as a commitment to impose faith-values in the public realm nor to foment a kind of 'neo-Christendom'. The more that concrete proposals in political-economy are embedded in Catholic values, thus promoting an integral and authentic development, the better it should be for all human beings, especially due to the inclusive notion of human dignity. Alternatively, in so far as concrete proposals coming from dialogues in which CST has participated are excessively detached from CST values, it would be the task of Catholic theologians to highlight the situation. But this issue could only be addressed in concrete situations and not in pre-theoretical appraisals.

Thirdly, theologians need to be aware that the more concrete the proposals are, the more likely they are to be contested, not only by political economists, but also by different theological schools, even among Catholics themselves. Regardless of the values underpinning these kinds of proposals, a debate around them will inevitably take place, although the content of such a debate can never be anticipated in advance.

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<sup>101</sup> The Bill, for instance, could include the need to present strong evidence of the impossibility of marital cohabitation, such as the partner being gay or alcoholic.

<sup>102</sup> See the work of the feminist academics Blofield (2001) and Gray (2004). Despite their strong criticism of the position of the Catholic Church, their studies reveal how the Church, when interacting in a public and open discussion, can propose policies that are not exactly aligned with its 'orthodoxy'.

For example, the application of a Tobin tax to international financial operations, proposed by the Pontifical Council of Justice and Peace (2011), has generated serious discussions and disagreements among political-economists<sup>103</sup> and theologians.<sup>104</sup> The idea of this tax comes from the Nobel-prize winning economist James Tobin,<sup>105</sup> who argued that because governments were incapable of taking advantage of massive movements of global capital in favour of their own people -meaning that such movements debilitate governments while empowering global financial institutions-, a small tax on foreign-currency transactions to reduce exchange-rate volatility may redress the balance. National governments could, in this way, foster their own local policies while being protected from financial crises derived from the increasing movement of capital across the globe. The collection of this tax, for instance, could be used to fight unemployment generated by austerity measures that governments have to take after being affected by global financial cycles which they can neither control nor prevent. Despite positive research sponsored by Scandinavian countries and by many NGOs on the feasibility of the implementation of this tax by 2001,<sup>106</sup> no political-economic measures were taken (Patomaki 2001). Thus, when the 2008 global financial crisis occurred, national economies were weaker than they might have been, with pernicious consequences for the poor of the countries most affected (Stiglitz 2011).

Reading this scenario, and in dialogue with financial advisers, the Vatican (Pontifical Council of Justice and Peace 2011) took up the idea of the Tobin tax. The aim was to further the notion in *Caritas in Veritate* of applying human principles such as reciprocity (34-37; 53), solidarity (43; 46-47; 57-58) or the common good (7; 40-42) to business so as to give economic transactions a human face, for which a reform in international finance organisation was

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<sup>103</sup> See the thorough analysis of Hanke et al (2010). For a positive technical financial analysis of Tobin taxes, see Stiglitz (1989), Tornell (1990), Westerhoff and Dieci (2006) and Xu (2010). For an alternative proposal to the Tobin tax, see Spahn (1995). For a study of the financial advantages and disadvantages of the Tobin tax, see Wrobel (1996) and Raffe (1998). For a recent political report (and debate) on the Tobin Tax and its eventual application within EU, see Seely (2013).

<sup>104</sup> Magister (2011) explains the internal complications the Vatican has experienced due to a document that is 'blasted with criticism'. In this same line of thought, Thavis (2011) criticises the mysterious gestation of this document. While Benedict XVI's spokesman, Fr. Lombardi, said the document should not be considered as official CST, Cardinal Turkson, head of the Pontifical Council for Justice and Peace, avows that the document is profoundly embedded in CST and that it attempts to respond to the present financial crisis as part of the new signs of the times. Although limited to the U.S. context, Zimmermann (2011) points out the controversies between Catholic theologians regarding this document. For a positive reception from faith based investors, see International Centre of Corporate Responsibility (2011).

<sup>105</sup> For an overview of Tobin's main proposal, see Tobin (1978, 1984 and 1991). For a comprehensive discussion of the Tobin tax and its challenges of implementation, see Haq et al (1996) and Patomaki (2001).

<sup>106</sup> Among the NGOs, ATTAC has been the most prominent in investing in the application of a Tobin Tax in order to reduce financial injustices worldwide (ATTAC=Association pour une Taxe sur les Transactions financières pour l'Aide aux Citoyens. See <http://www.attac.org/>). For economic objections to the Tobin Tax, see Spahn (1995).

required (65-67). There was an opportunity to start with this tax, which, arguably, requires a novel financial international structure.

Ongoing discussions<sup>107</sup> evidence that the Vatican claim for a Tobin Tax is a highly contestable suggestion that probably needs further discussion and analysis, especially regarding its feasibility. Yet, such discussions -and their eventual political outcomes- would be the result of a pluralistic public debate which CST cannot but support (*Octogesima*, 4). What the Church is trying to do, following its social methodology, is to propose a different system from the current one, which has proved to be not only financially unsustainable, but also socially devastating (Stiglitz 2011). It may be argued that these kind of proposals are not the Church's proper mission, that being a religious one (GS, 42). Nonetheless, as Vatican II states, out of this religious mission comes a function, a light, and an energy which can enrich the economic or political order (ibid.). For such enrichment to be effective, concrete actions to socio-economic problems are required. By proposing a Tobin Tax -a proposal that is already drawn on a dialogue with policy makers and economists- the Church is fulfilling its religious mission on the one hand, while invigorating the debate and challenging the *status quo* which resulted in a global financial mess on the other.

### *Economic objections*

Practical *economists* might reject a dialogue with CST based on the fact that proposals coming from Catholics would tend to be unrealistic.<sup>108</sup> Although full of good intentions, economic policies influenced by Catholic thinking -they could argue- cannot be seriously considered because they are grounded in idealistic and not in realistic views of modern society. However, proposals coming from the CST method herein illustrated are not merely well intended. Their starting point is actual reality, often unresolved situations of the economic world (e.g. financial crises and how they affect millions of people, particularly the poor). The proposals are also the result of discernment with others, not necessarily theologians, not necessarily Catholics. Therefore, rather than dismissing these proposals in advance, economists could well take them seriously and test them before qualifying them as utopian. After all, there are plenty of examples which illustrate how a dialogue with Catholic values has enriched political-economic policies. Some of them were considered idealistic before they had been applied, such as the organisation of labour and the creation of unions in the 19-20<sup>th</sup> century (promoted by the Catholic inclusion of

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<sup>107</sup> See Philip Boot's (2014) criticising Cardinal Turkson's proposal for the creation of a financial/taxation supra-national authority, and the discussion regarding the Tobin Tax in China (Yao 2014).

<sup>108</sup> For an excellent collection of articles reflecting the main opposition against and the main support for connecting economics with religion, see Oslington (2003). For a Catholic objection to CST feasibility, if this means opposition to liberal economics, see Woods (2002 and 2005). For a critical evaluation of CST economic position, see Rodríguez Braun (2000).

human dignity into economic production); or the creation of monumental cathedrals by entire communities in the Middle Ages (based on the Catholic notion of a common good greater than the individual, and on the relationship between temporal ends and the final end); or the promotion of the market and freedom of enterprise (fostered by Catholicism since the Middle Ages as the best instrument for economic development and peaceful relationships) (Negri Zamagni 2010).

Besides, the importance of bringing beliefs into matters of economic justice has been recently highlighted by the World Bank, who acknowledges that religious beliefs are perhaps the most powerful ones in shaping people's attitudes and in forging (or hindering) economic development (Narayan et al. 2000). These attitudes, underpinned by faith, can have a great impact in economic 'action', as was the case of the Jubilee 2000 campaign, where thousands of mostly religious campaigners, convinced the rich creditor-countries to cancel approximately 120 billion US dollars of debt owed by the most impoverished nations.<sup>109</sup>

### *Political objections*

*Politicians* rejecting proposals from the Catholic Church, because they lack the objectivity necessary for public debate in contemporary pluralistic societies, is an argument commonly raised worldwide.<sup>110</sup> Nevertheless, there is a widespread –if not unanimous – recognition in social sciences in general, and in social morals in particular, of the necessity of interdisciplinary approaches, which include the religious ones (see Farley 2008:9). However disparate our political views are, however diverse our social moral standards may seem, the truth is that we do make judgments of right and wrong –even if we only judge whether some actions are better than others in terms of human wellbeing– and we do experience ethical claims in response to these judgments (ibid.:15). Still, as Sen (2009) avows, in order to transform such judgements into political action in a pluralistic society, it is imperative to discuss them publicly. Those discussions cannot but include peoples' visions, even when some visions are influenced by their faith.

One can argue, alongside John Rawls (2005),<sup>111</sup> that in a secular society, religious arguments need to be set apart from the public process of policy-making. Otherwise, policy-makers would be acting contrary to the nature of their work. Instead of governing for everybody, through some

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<sup>109</sup> See <http://jubileedebt.org.uk/>.

<sup>110</sup> See, for example, Coalición Argentina por un Estado Laico: <http://www.coalicionlaica.org.ar/> and Dawkins (1995 and 2000),

<sup>111</sup> Discussing different nuances of objectivism lies beyond the scope of Chapter 3.3. For a thorough explanation of this, see Rawls (2005:110-129). Basically, Rawls argues that 'a moral and political conception is objective only if it establishes a framework of thought, reasoning, and judgment' (ibid.:112) sufficient to convince all reasonable persons involved that it is reasonable. See also Sen's comment on Rawls's position, mixed with Hilary Putnam's ontology and Habermas's process of public dialogue (2009:39-44).

political ideas based on reason, they would be trying to impose their faith by the use of politics. Instead of seeking for a common place in the 'polis' where all members can cohabit, despite their ultimate disagreements about the nature of the world, the ends of life, and the path to salvation, politicians mixing their faith and public affairs would be campaigning for the privilege of their own religion.<sup>112</sup> This would prevent any possibility of justice as fairness, because such an attitude does not respect equality nor diversity, but reflects a selfish movement hindering a true sense of community. Indeed, the inevitability of competing interests and doctrinal disagreements reinforces the need for justice through a process of public reasoning, in which any kind of 'supra-natural' revelation not shared by everybody cannot be accepted as politically normative. What politicians need to do, instead, is to be as objective as possible in order to generate a public debate from which actual solutions to particular public issues can yield.

Nonetheless, this position often gets sidetracked into fruitless wrangles about 'criterion of objectivity' (Sen 2009). Political ideas do not come out of a moral or beliefs vacuum (even if it were an 'atheist' belief). Any political proposal will have to draw on –if only to repudiate– some tradition whether philosophical, cultural, scientific, ideological or religious. It can also eclectically draw on many traditions, testing whatever critical and constructive relationships they can achieve.<sup>113</sup> As Stanley and Wise (1993) have described, we are children of our time, and our beliefs, relations and interactions affect our approaches as academics and as politicians as well. As social sciences cannot be totally objective, at least in terms of hard science objectivism, because the subjectivity of scientists is always influencing the way they seek for the truth, so it happens with politics. Moreover, not only politicians but also their constituents' beliefs are part of the equation. Pretending un-alloyed political proposals seems to be beyond reality.

Also, to be fair to John Rawls, his idea of separating religion from politics in a liberal society has nothing to do with a hostile position against citizens of faith or against values influenced by religious beliefs (Cohen and Nagel 2009:22). Those who have studied Rawls's work in depth or knew him personally, agree that his writings were seriously influenced by his deeply religious temperament (ibid.:5). Core notions to Rawls's work prove this. For example: a) 'reasonable faith', which should be defended by political philosophy, does not exclude religion from the public square. Rather, it asks religious believers to express their values reasonably, and to subject their values in the polis to a constitutional democracy (ibid.); b) 'toleration', endorsed on religious

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<sup>112</sup> Chapter 12 addresses the problematic approach to justice as a personal or group-privilege.

<sup>113</sup> We draw here on the argument Margaret Farley puts to counter the rejection of religious traditions (see Farley 2008:15).

grounds rather than on intolerance to it,<sup>114</sup> is an attempt to propose to people from different confessions that a political cohabitation is possible (ibid.:5.22-23); c) 'the rejection of merit', which argues that a social order, if it aims at justice, cannot distribute benefits according to merits, because by so doing the disadvantage will always be belittled,<sup>115</sup> has a clear influence of his understanding of God's grace (ibid.:5.13-16.18); d) the 'separateness of persons', essential for his critique on social contract theories and his opposition to aggregation, maximisation or any inter-changeability of persons, is not merely based on Kantian ethics,<sup>116</sup> but also on Rawls's notion of faith or moral community. Communities, for Rawls, are the *locus* where God affirms each person's distinctness. Despite being social beings by nature, humans are not fused with 'the social', precisely because each individual has something special and unique. Still, such individual uniqueness can only shine through interpersonal relations (ibid.:5.9-11); and e) the 'original position' of the *Theory of Justice*, as he powerfully remarks in the conclusion to such a masterpiece, 'enables us to see the social world and our place in it *sub specie aeternitatis*' (ibid.:5). Therefore, in developing a particular form of political liberalism, Rawls is not agreeing with those who see liberalism as a totally sceptical or secular idea. Rather, he proposes a mechanism in which the wider realm of religious values can reach a minimum political consensus (Rawls 2005:159).

Amartya Sen follows Rawls regarding his notion of political pluralism and public reasoning, which is not only not hostile to political proposals grounded in religious values, but also has a specific theological background (Hindu and Buddhist), as further explained in Part II. Sen (2005) promotes 'secularism' as a way of tolerating all kinds of ideas, regardless of their religious background. It is precisely the diversity of arguments, when reasonably put,<sup>117</sup> that brings a special richness to society. Consequently, according to this line of political-philosophy, there is no reason to ban political proposals coming from Catholic ideas in dialogue with social sciences.

What CST method endorses is not just an inter-disciplinary approach to reality, but also an inter-disciplinary proposal for the political realm. Rejecting it in the name of Rawls's approach is a misconception of his work and a tergiversation of his great legacy. Rebuffing it in the name of political objectivism does not take into account the serious discoveries and explanations of

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<sup>114</sup> See the illuminating essay where Rawls describes his religious journey: 'On My Religion', apparently written in the 1997, published posthumously in 2009: 259-269.

<sup>115</sup> In order to limit this damaging distribution Rawls proposes the 'Difference Principle', see Rawls (1971:60-83).

<sup>116</sup> Particularly the fact that each human being must be treated and respected as an 'end', never as a 'means'.

<sup>117</sup> To see what it means to argue 'reasonably', see Sen (2009:39-44), where he discusses Rawls's proposals of political objectivism in the light of Hilary Putnam's ideas (2004). For more about Sen's vision of secularism, see Chapter 5.1.3. For more about Sen's view of public reason and democracy, see Chapters 5.1.2.; 5.1.3; 5.1.4; 6.3; 6.4.3; 7.1.; 7.3.



modern social sciences and politics.<sup>118</sup> Denying it in the name of democracy is to denaturalise its meaning as public reasoning, as Sen (2005) demonstrates. Disallowing CST method due to secularism is to misjudge CST and to confine secularism to a “tough anti-religious sense”, depriving secular societies of the richness of diversity and tolerance.

### 3.4. Conclusion

In this chapter we have critically analysed the modern methodology officially accepted by the Catholic Church with regard to social ethical issues: ‘seeing-judging-action’. We started by questioning if the ‘seeing’ was an ideological approach to reality. According to some confusing statements from CST documents, social scientists can easily acknowledge this first state of the Church’s method as a dogmatic imposition, i.e., that the Church dictates to believers how they should ‘see’ their social realm. If this were the case, a dialogue between CST and CA would be impossible. However, a closer examination of CST documents and reflections shows the opposite. The ‘seeing’ proposed by CST is always in context. To read such context, other views are crucial, even if they are to be contested. Moreover, for CST, a historical vision of social concerns can neither be a monopolistic one, nor can it be the mere expression of past views. If the driving force to read the sign of the times is love (*Caritas in Veritate* 2009), then such a reading ought to be in relation with others, particularly with those seeking truth and justice, regardless of their beliefs. An isolated faith-view must therefore be discarded. Unlike in sexual ethics, where the Catholic Church utilises a deductive (almost dogmatic) approach to read the sexual realm, in social ethics the Church employs an inductive approach, for which partnership with others is crucial (*Evangelii Gaudium*, 182).<sup>119</sup> Indeed, socio-economic matters are normally better observed from expert-economic eyes that are not necessarily inside the Church. Still, a combination of views may widen the horizon, resulting in a better scanning of reality, which in turn can challenge past views held by the Church and open up new possibilities for social engagement.

We then moved to study the second stage of CST methodology: ‘judging’ in the Light of the Gospel. Based on biblical research, we showed that the Gospel does have an ethical concern relevant to present societies. This differs from assuming that the Bible has responses to or suggestions for all or many present social problems. The development of biblical studies in the past century, as Curran (1985) explains, has provided clear guidelines to the ‘judging’ of CST methodology, namely proper hermeneutics. This legacy restrains CST and its interlocutors from

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<sup>118</sup> See Tracy (1981).

<sup>119</sup> For further reading on this issue, see Curran (1972 and 1988).

arbitrarily selecting some texts in order to foster dogmatic statements, obliges them to take biblical texts in their socio-political and theological-linguistic context and hence to recognise their own limitations, and reminds CST and their partners that ethical pre-suppositions of readers should be taken into account. Yet, Scriptural texts, read and interpreted by living communities, can help not merely in understanding reality, but also in finding ways of responding to situations in which imagination and motivation are wanting, as is the case with the current financial crisis.

In this chapter we also discussed the two most forceful objections to the use of the Bible in social ethics. Firstly, the common secular objection that the Bible is not an appropriate tool to read present reality, precisely because it was written centuries ago and with the aim of addressing theological issues rather than socio-economic ones, can be well countered by the wise analogy of 'great art' used by Schneiders (1991). As Latin or Greek great art, or even Shakespeare, have influenced people for centuries, disregarding those texts due to their age or religious context will not do justice to them nor to the people who have been influenced by them. Likewise, if the Bible is to be considered as 'the' great Christian art, whose narratives have had an immense impact on social behaviour in various communities across the world through centuries, it seems that its use in the 'judging' of present social ethical issues will enrich rather than impoverish the analysis. As Amartya Sen uses some Hindu narratives in order to explain matters such as human rights, public reasoning and social inclusiveness,<sup>120</sup> so CST can contribute to the discussion by a proper hermeneutic of core texts on social ethics, such as *The Good Samaritan*, which is also quoted by Sen (2009:170-173). The second objection to the use of the Bible in modern social ethics comes from the theological side, and it is related to a misunderstanding of the eschatological dimension of some biblical texts. However, a well-balanced Christian eschatology, neither over-emphasising the 'already' nor the 'not yet', and seriously including in the analysis the life of millions of people, particularly the oppressed and minorities -whom such an eschatological approach has encouraged to dream and work for a better world-, appears to be a timely theological contribution to support –and not rebuff- joint-ventures between CST and CA in order to 'judge' current political-economic problems.

Finally, we explain that the third stage of the method, i.e. 'acting' or proposing courses for action, is the least problematic in terms of 'methodological' analysis. Firstly, because we cannot know which course of action to take without reading the signs of the times, in dialogue, and in the light of the Gospel. Secondly, because the actions to take, as a consequence of dialoguing, do not need to faultlessly reflect Catholic teachings, which might relieve worried and meticulous

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<sup>120</sup> For further explanation of Sen's view, see Part II.

theologians. Thirdly, because economic policies drawn from the dialogue with Catholic thinkers or ideas do not necessarily contradict economic science nor tend to be inefficient. There are plenty of historical examples in which such a dialogue has promoted successful economic measures, as occurred in the Middle-Ages with the promotion of free markets, or in modern times with the creation of trade unions, examples which might relieve concerned traditional economists. Lastly, when the CST 'action' stage is rejected by politicians, due to its lack of 'objectivity', they have not taken on board what 'objectivity' really means in terms of modern social sciences and political philosophy. Moreover, as Sen (2005) argues, this kind of rejection will not only debase the idea of democracy and public reason, but will impinge on the very idea of secularism and toleration.

All things considered, the theological methodology proposed herein seems to be an appropriate tool with which to sustain a dialogue between CST and CA. Whether there is a methodological correlation from the economic side is something that will be analysed in the following chapter.

## 4. Epistemology of Economics

In previous chapters we explained that various branches of Christian theology differ in their methodologies, especially regarding their either inductive or deductive emphasis, and we analysed how the inductive approach of CST facilitates the communication with other social sciences, particularly with economics. This chapter intends to consider the reverse side of the coin. The question of whether economics, based on its own epistemology, can accept the invitation of CST to dialogue about issues of 'development-freedom' and 'wellbeing-justice', will be examined. We will firstly address the main features of Economics' methodology. Secondly, we will explore Amartya Sen's methodological view on this particular subject. We will conclude that economics, especially as understood by Sen, is methodologically compatible with CST.

### 4.1. Methodology in Economics

Economics studies how a society decides what goods/services to produce, and how and for whom to produce them (Begg 2009:2).<sup>121</sup> Given that people in a society have to resolve the conflict between: (a) their limitless desire for limited goods and services;<sup>122</sup> and (b) the scarcity of resources to produce such goods and services (e.g. labour, machinery, raw material), economics as a science analyses how human beings take decisions to solve that conflict (ibid.). In the case of modern mainstream economics, theories (models) are produced to explain human behaviour and decisions, and then those theories are tested against actual facts. These models are often abstract and mathematical ones: simple axioms and assumptions are used to build up a consistent logical system with which economists can simplify and explain theoretically the practical and complex trends and relationships in economic life (e.g.: consumers will tend to consume more if their income increases; or individuals tend to maximise their profit at any given opportunity).<sup>123</sup>

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<sup>121</sup> Similar definitions can be found in Backhouse (2002) and in most economic texts and websites. Most of these definitions relate economics to scarcity, competition, production, consumption and the satisfying of unlimited desires (see Mofid 2005:27-29).

<sup>122</sup> Some academics and movements challenge this economic assumption (see for example Andrews and Urbanska 2009, Shilson-Thomas 2008, or Brueggemann 1999 and his challenging essay of the theology of 'abundance'). They argue that our desire for goods and services are not naturally limitless, and that people can be actually more satisfied in having less than in acquiring more. Besides, the argument continues, the uncritical acceptance of the supposedly endless desire for goods and services generates an economy that wreaks serious havoc on the planet, source of the goods and places where services are rendered. This environmental dilemma questions the validity of the mainstream economic theory. Unfortunately, this fascinating topic exceeds the scope of our research.

<sup>123</sup> Economic reasoning lies therefore between theoretical and empirical analysis (see Boumans 2004).

However, the way these models are designed varies significantly within economics. Neo-classical economists,<sup>124</sup> influenced by the logic of positivism,<sup>125</sup> are keen on applying the use of natural sciences to economics. For them, it is necessary to observe human behaviour, design a pattern of conduct accordingly, and then experiment with it by use of comparisons. This will lead to the discovery of a rule or law over which economic policies can be designed in order to solve the basic conflict of economic life (desires and scarcity) in the most efficient manner possible. Nonetheless, an over-emphasis on economic analysis poses a challenging question to economists: 'mathematics being synonymous with rigor and precision, how is it that it plays such a role in a discipline where vagueness reigns?' (Mofid 2005:33). Indeed, to systematically grasp economic decisions -inexorably related with complex criteria- seems to be a task that needs more than mathematical models.<sup>126</sup>

As scientific positivism evolved in 'logical positivism',<sup>127</sup> so economic-positivism has evolved in 'logical economic-positivism'. For the latter, the *a priori* logical reasoning must be tested *a posteriori* by using empirical evidence in such a standard way that can satisfy the physical-science model.<sup>128</sup> Economists following this line of thought have therefore emphasised the need for experimental methods that can test economics laws. Often –they argue–, the data used to test economics models is merely 'observational', a reason for which further actions are needed in order to improve what they call the 'scientific' level of economics and the accuracy and efficiency of its models. Although econometrics has attempted to recreate an experimental set-up in order to control confounding variables, without experimental data –the argument follows–,

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<sup>124</sup> See Friedman (1953).

<sup>125</sup> A movement born in England and France during the XVII/XVIII centuries. Although Francis Bacon and Galileo contributed substantially, Auguste Comte is regarded as its main exponent. He explicitly argued in favour of applying the scientific method of natural/physical sciences in social sciences too. Therefore, observation, experiment and comparison are key elements of research, as well as the use of mathematical models –although he warned against the danger of overusing them. Locke, Hume and Mill have contributed to positivism through their empiricism; and Hobbes, Descartes and Spinoza through their use of mathematics (Sumner and Tribe 2008:59).

<sup>126</sup> Some experts blame Samuelson's *Foundation of Economic Analysis* (1947, enlarged ed. 1983) for driving economics into a total 'mathematisation' of the discipline (see Mofid 2005:32-33).

<sup>127</sup> A movement that arises in the 1920s and 1930s from the Vienna Circle (Neurath, Carnap, Reichenbach, Godel, Walsman, Schlich) with whom Karl Popper, the father of modern epistemology, had an early association. Popper distanced himself from the Vienna Circle because he argued that a theory is scientific so long as it can be tested. Yet, he proposed that the method for the test should be a 'falsification' rather than a 'verification', meaning that scientific efforts should be put into disproving hypothesis by observation rather than on verifying them (Sumner and Tribe 2008:60)

<sup>128</sup> Note that this structure is both deductive (from the logical reasoning) and inductive (from the experimental test). In this sense, modern economics follow the prevailing epistemological trend in social sciences, for which all sciences need a combination of both inductive (from data, through explanation, to theory) and deductive (from theory-principles, through testing, to data-reality) approaches in order to address its object of study in the most accurate and comprehensive way possible (Sumner and Tribe 2008; Daw 2011).

econometrics falls short in its purpose, regardless of the use of orthogonal residuals and other sophisticated mathematical methods.<sup>129</sup>

One of the first to highlight this deficiency in economics and to advance a more empirical verification of economic assumptions was the Hungarian philosopher of mathematics and science Imre Lakatos (1970),<sup>130</sup> who following Karl Popper, developed a methodology that challenged traditional positivistic views. By introducing rhetoric and discourse analysis and the sociology of scientific knowledge in positive economics, and by re-discovering J.S. Mill, Lakatos offered a broad and comprehensive view of growth and economic-development, introducing new methodological tests and therefore widening the positivist-economic understanding of human behaviour (Backhouse 2004). Since Lakatos opened new methodological lines in economics research, his once novel approach has been rapidly superseded (Davis *et al.* 2004), especially by introducing constructivist theories into economics.<sup>131</sup> What is more, recent trends in economics have proposed novel experimental methods, furthering the constructivist schools' trend, such as the Randomised Control Trials or the Laboratory Experimental Games (*ibid.*). With the former, for instance, the effects of a project are analysed by randomising interventions; with the latter, those effects are studied by changing the incentives of 'players' in controlled situations. The increasing sophistication in methodology economics during the last decades, particularly in experimental methods, has led experts to develop a subtle division between a 'phenomenal model' (experimenter's view of how the world works), an 'instrumental model' (the view on how the experimental apparatus works), a 'social process model' (the experimental subjects and the experimentalist), and a 'subjective model' (experimental games with direct participation of subjects) (*ibid.*).

These neo-economic models, not restricted to mathematic analysis and linked with people's cultural and ethical values, are aligned with some economic scholars who have resisted marginalising their area of research from actual human lives, and also even with some Nobel Prize-winning economists who have worked to bring economics out of its 'autistic' approach. An impressive example of the scholarly-resistance against the 'mathematisation' of economics is the movement generated by a challenging petition from French students of La Sorbonne signed in 2000, protesting against the exclusion of social aspects of economics from the curricula.<sup>132</sup> The

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<sup>129</sup> For a brief and thorough explanation on how Sen's CA challenges the notion of logical positivism, see Putnam (2002).

<sup>130</sup> The London School of Economics (LSE) has a whole department in his name. See <http://www2.lse.ac.uk/philosophy/about/lakatos/Home.aspx>

<sup>131</sup> They question how scientists came to hold their theories and beliefs, analysing social components and applying historical hermeneutics and even gender and ecological approaches (Backhouse 2004).

<sup>132</sup> See Student Petition of *Autisme-Economie* (2000) and Fullbrook (2003).

petition was followed by economic students from other universities, such as Cambridge in 2001 and Harvard in 2003,<sup>133</sup> and it has initiated serious reconsiderations of economic methods (Fullbrook 2003).<sup>134</sup> Another stimulating example is the non-profit organisation World Faiths Development Dialogue (WFDD), established in 1998 by James D. Wolfensohn, then President of the World Bank, and Lord George Carey, then Archbishop of Canterbury. Now an independent entity housed in Washington D.C, this organisation aims at underlining, reinforcing and publicising 'the synergies and common purpose of religions and development institutions addressing poverty'. They also 'explore issues on which there is little consensus and where common ground is unclear among different faith traditions, within faiths, and between faiths and development institutions'.<sup>135</sup> For instance, traditional economists have often assumed that their standards of assessing poverty, namely production and efficiency, are incompatible with Christian standards that include evaluation of distribution and equity. A similar assumption is often found in traditional theologians. The WFDD has conducted in-depth research to demonstrate that production/efficiency and distribution/equity can complement each other.<sup>136</sup>

Other examples of economists claiming for a broader approach of economic science to human reality are:

- a) the Russian Stanislav Menshikov (1975 and 1988), who has argued that the standard neoclassical model is actually in conflict with human nature, because most people are not really 'maximisers' but rather 'satisfiers', which includes satisfying their need to be in equilibrium with themselves, with others and with nature (Mofid 2005:42);
- b) Douglass North, Nobel prize-winner 1993, who highlighted the need for a better and comprehensive understanding of the nature of human coordination and cooperation, thus complementing the assumption of scarcity and hence competition in formal economics. North has also acknowledged and studied the influence of ideologies and religious beliefs on economic decisions (North 1990);
- c) Amos Tversky, the famous cognitive and mathematical psychologist who, along with Nobel Economic laureate 2002 Daniel Kahneman (1974), has developed a theory to explain

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<sup>133</sup> For a brief history of the movement, called 'post-autistic' movement, see <http://www.paecon.net/HistoryPAE.htm>

<sup>134</sup> The claim is not to abolish neo-classical economic methods, but to expand them. Due to the movement's argument in favour of a wider economic analysis, the economic jargon now distinguishes between 'narrowband' and 'broadband' economics.

<sup>135</sup> See <http://berkleycenter.georgetown.edu/wfdd/about>

<sup>136</sup> See <http://berkleycenter.georgetown.edu/wfdd>

irrational economic behaviour, challenging the “rational-efficient market hypothesis” as the dominant paradigm in the field;<sup>137</sup>

d) the North American economic-historian David Landes, emeritus professor at Harvard and Georgetown Universities, who, paraphrasing Max Weber, bluntly expressed that if we learn anything from the history of economic development, it is that culture makes all the difference (1998). Responses to market signals are inevitably culturally embedded, and culture cannot be detached from what people value and from a natural conception of societal relationships (Mofid 2005:44);<sup>138</sup>

e) Nobel Prize-winner Amartya Sen, who strongly argued in favour of resuming the original Aristotelian ethical dimension of economics (1988), called for a re-examination of inequality transcending a mathematical approach (1992), showed that economic-development goes beyond material growth (1999), and asserted that economics is linked with individuals and peoples’ wellbeing, hence with an idea of justice (2009);<sup>139</sup>

f) Nobel Prize-winner Elinor Olstrom, who investigated the complexities of human motivations, social organisations and institutions and how they impact in economic analysis and policies (2010). In particular, she has studied the importance of common-pool resources (as opposed to common-property or private property) and their governance, for which trust and communication play a fundamental role; and

g) Nobel Prize-winner 2013 Robert Shiller, for whom one of the biggest mistakes of post WWII economics has been its indifference to psychological and sociological research (see Akerlof and Shiller 2009).

To summarise and illustrate the variety of epistemological and methodological positions in economics, a riveting quote from Francis Bacon (1620) can help:<sup>140</sup>

Those who have handled sciences have been either men of experiment or men of dogmas. The men of experiment are like the ant, they only collect and use; the reasoners resemble spiders, who make

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<sup>137</sup> ‘Before their work, economists had gotten far in their analyses of decision making under uncertainty by assuming that people correctly estimate probabilities of various outcomes or, at least, do not estimate these probabilities in a biased way...Even if some people place too low a probability on an event relative to what was reasonable, economists argued, others will place too high a probability on that same event and the results would cancel out. But Kahneman and Tversky found that this is not true: the vast majority of people *misestimate* probabilities in predictable ways’ (Henderson 1993).

<sup>138</sup> Some economists have investigated in depth the relation between economics and cultural life. See, for example, the excellent compendium of Ruth Towse (2010). See also Appendix 4.

<sup>139</sup> Sen’s methodology or approach to economics is analysed in Chapter 4.3, while his work will be more extensively studied in Part II of this Thesis.

<sup>140</sup> I am extremely grateful to Dr Bereket Kebede (School of International Development, University of East Anglia, London), for his contribution in this analysis, based on Kebede (2011).



cobwebs out of their own substance. But the bee takes a middle course: it gathers its material from flowers of the garden and of the field, but transforms and digests it by a power of its own... Therefore from a closer and purer league between these two faculties, the experimental and the rational (such as has never yet been made), much may be hoped.

If we are to apply this framework in economics, we can identify the '*ants*' with experimental economics, especially with the new trends described above, such as the Random Controlled Trials and the like. These 'ant-economists' argue for a new experimental test of economic laws in which different variables can be brought on board, transcending the classical positivistic assumptions. By so doing, they challenge not only the classic 'theoretic-led' but also the neo-classic 'data-led' approaches in mainstream economics.<sup>141</sup>

On the opposite pole, the '*spiders*' are those who use simplified and formal models to understand complex realities which cannot be entirely addressed through empirical methods. These 'economic-spiders' dissent from philosophers who claim that economic models are unrealistic because they do not represent the real world.<sup>142</sup> Their point is that economic models are useful not just as tools to interact with the world, but also to understand it and to predict human behaviour. The reliability of these predictions does not necessarily depend on direct experimental tests, but on a pragmatic use of observation and data (indirect empiricism).<sup>143</sup>

Finally, the '*bees*' can resemble those economic schools who use mainly econometrics to analyse data and test theories (Formalism), such as the New Institutional Economics school, or the Behavioural Economic approach, or Computational Economics. Although this line of economic thought is more difficult for social scientists to understand, it is an acute critique of neo-classical economics, a critique that carries weight because it is coming from the 'normative' heart of economic science. For such a reason, social sciences should never disregard these Formalistic approaches when proposing an inter-disciplinary dialogue. Indeed, given that Formalism aims at making explicit the logical structure of economic theories, it is well equipped to further and strengthen the *spiders*' evidence on the one hand, and to improve analytical perceptions on the other.<sup>144</sup> For example, New Institutional Economics has developed a more refined understanding of the inter-relationship between the individual agent and socio-economic institutions. The nature, scope and role of institutions cannot be ignored when considering

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<sup>141</sup> Not all theories derived from neo-classical economics are data led, as the example of the theoretical theory of general equilibrium of Arrow-Debreu (1954) shows (for an overview of the theory, see Geanakoplos 1987). However, for the purpose of this research, this intra-economic discussion will not be explored. Considering that most neo-classic approaches are 'data-led', for purpose of clarity, it is not unfair to situate them in this group.

<sup>142</sup> For a serious analysis about the nature of economic models see Morgan and Morrison (1999).

<sup>143</sup> For a compelling and shrewd defence of classic theoretical positive economics see Friedman (1953).

<sup>144</sup> For a comprehensive study on the role of mathematics in economics and the influence of 'Formalism' see Kesting & Vilks (2004).

individual reasons/motivations for action and vice-versa.<sup>145</sup> Inter-subjectivity is a core aspect of economic rationality (Hargreaves Heap 2004),<sup>146</sup> since shared beliefs have an enormous influence on individual decisions, and judgements on agents' values cannot be taken in isolation (ibid., Sen 1988).<sup>147</sup>

From this brief analysis,<sup>148</sup> and in terms of our research, it is reasonable to infer that the new approaches in economics (the *ants* and specially the *bees*), do count in the interacting with other sciences (e.g. sociology, psychology, ecology) in order to analyse with a magnifying lens economic-rationality and economic models. By so doing, they are reversing the trend in mainstream economics of excluding social sciences.<sup>149</sup> Indeed, orthodox economics, in its ambition to give economic theory a resemblance to natural sciences, has systematically omitted aspects of economic phenomena that cannot be treated like natural phenomena, such as culture, uncertainty or emotional constraints (Róna 2011, Hargreaves Heap 2004, Allen 1992, Sen 1988). The inclusion of such natural phenomena requires the assistance of other disciplines to answer basic economic questions, such as why people decide to consume some products or not; or why a corporative board decide to reduce or increase production, or to open or close certain branches of the company; or why a government decides to tax certain activities and not others.

It is this inclusive and broader trend in modern economics, in which Amartya Sen plays a pivotal role, which extends an invitation to dialogue to social sciences, such as theology. Yet, in order to interact with this line of economic thought, CST would need to choose a particular school. The next section will question if Sen's view of economics keeps the door open for a dialogue with CST.

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<sup>145</sup> For a critical analysis of the relationship between individuals and institutions see Boettke (1990) and Ostrom (2010). For a study about the economic institutions of capitalism see Williamson (1985).

<sup>146</sup> Part III further explores this dimension of economics.

<sup>147</sup> Nonetheless, some argue that New Institutionalism has obscured some of the best insights of the old Institutional Economic school, in which interactions between individuals and institutions were seen as both top-down and bottom-up processes, and that neither was exclusively determining the other (Hodgson 2004). Regardless of this dispute, Hodgson recognises that an analysis of the ways in which institutions affect individuals is lacking in the old Institutionalism, and that the New one provides fertile ground for further work (Davis, *et al.* 2004).

<sup>148</sup> Our short analysis on the methodology of economics does not pretend to address the wide and rich dimensions of differences between economic schools, nor to introduce a comprehensive view of the tensions between classic economics and new trends in the field. As happens when we address the methodological tensions in theology, our study is limited to the main points we consider relevant to present an introduction to methodological problems in economics and the possibilities that modern methodological trends offer for the interaction between economics and CST.

<sup>149</sup> For an excellent account on the relation between economics and psychology, see Akerlof and Shiller 2009.

## 4.2. Sen's approach to economics

For Sen (1988), modern economists have not been friendly partners regarding inter-disciplinary work. By narrowing the actual essence of economics by the elimination of ethics, their over-technical engineering approach has pushed aside crucial companions for their own research and work, namely social sciences in general, and ethics and political philosophy in particular.

### 4.2.1. Economics: ethics & wealth

Sen proposes a twofold image of the origins of economics to cogently depict its imperative ethical dimension. On one side of the picture, Sen positions Aristotle's *Nicomachean Ethics*: 'Aristotle relates the subject of economics to human ends, referring to its concern with wealth' (Sen 1988:3). However, the seeking after wealth, in Aristotle's view (*Nicomachean Ethics*, I.1-5),<sup>150</sup> needs to be ordered or positioned in relation to other human ends. In the public arena, it is 'politics' that dictates which actions should be promoted and which ones should be avoided in order to achieve human goals in the best and most efficient manner possible, economic goals included. Therefore, economics does not only study how to produce wealth, but also how to integrate that wealth with other human goals, and above all, how to politically organise the creation and distribution of wealth in order to improve the citizens' quality of life. Sen highlights the fact that economics cannot escape from the broad ethical question of 'how should one live?' when analysing human economic behaviour and motivation –a core issue in economic studies. Moreover, when judging the results of economic policies –another pivotal activity in economics, the analysis cannot be limited to what is good for one person only, since 'it is finer and more godlike to attain it for a nation or for city-states' (*Nicomachean Ethics*, I.2). In this Aristotelian view, therefore, economics is essentially an ethical subject.

On the other side of the picture, Sen collocates Kautilya's *Arthashastra* (Indian's instructions on material poverty from the fourth century B.C.), which is 'the first book ever written with anything like the title 'Economics'' (Sen 1988:5). Sen explains that Kautilya begins by distinguishing four fields of knowledge: metaphysics, ethics, politics and *economics* -the science of wealth-. Socratic questions about the meaning of life, ethical considerations on what good or bad actions are, and political concerns varying from 'building of villages' to 'influencing parties in an enemy state', or from 'collection of revenue' to 'tariff regulation', are not specifically included in the economic treaty. Rather, the strict economic analysis is reserved for the engineering of wealth production (ibid.:6).

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<sup>150</sup> See also *Politics* I.viii-x and III.ix.

#### 4.2.2. Two methodologies: ethical & technical

Sen argues that each side of this picture represents the two main methodologies in the field. The Aristotelian one illustrates the ethics-related origin of economics, which has generated the ethical, political and even metaphysical approach in the discipline. Conversely, Kautilya's side illustrates the logistic and engineering-based origin, which has generated the positive-economic approach. While some prestigious economists such as A. Smith, J.S. Mill or K. Marx have taken the ethical questions seriously, others such as D. Ricardo, W. Petty or L. Walras have been more concerned with the engineering problems. For Sen, the key is to find a balance between the two, not only because none of the approaches is pure, but also because they can help each other in enhancing efficiency and accuracy in economics analysis. It is precisely this crucial balance that modern economics has not been able to sustain, hence impoverishing the nature of economics by shunning ethical concerns affecting actual human behaviour, and by eschewing any normative analysis (ibid.:6-7).<sup>151</sup>

Sen asserts that his position does not intend to diminish the engineering approach to economics, but to highlight the interdependency between technical and ethical economics. To support his argument, he provides a lucid example: 'general equilibrium theory' can technically help the ethical economic approach in terms of analysis and policies regarding hunger and famine, and vice-versa (ibid.:8-9). Given that equilibrium theory deals with production and exchange involving market relations, it can sharply contribute to understanding, in a simple way, the complex link between production, consumption and exchange.<sup>152</sup> This understanding is essential to support any political-economic decisions, which, based on the ethical judgment that hunger is wrong, aims at tackling the causes of famines and at solving the problem of the shortage of food suffered by a great proportion of the population. In this regard, Sen reminds us that catastrophic famines have occurred in situations of high and increasing availability of food, which is both a technical and an ethical problem. Hence, actual solutions need a mutual contribution from the technical and the ethical sides of economics.

From the ethical side, the famine example proves that a mere 'instrumental' approach and utilitarian thinking are not enough to assess what really matters to ordinary people, something that economics has always attempted to do. In those cases of extreme hunger, it was evidenced

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<sup>151</sup> On related methodological issues, Sen quotes Robinson (1962), Latsis (1976), Ben and Kristol (1981), Dyke (1981), A.K. Dasgupta (1985), Steedman and Krause (1986) and Woo (1986).

<sup>152</sup> The model of the general equilibrium theory is abstract and simplistic with regard to the complexity of social institutions and with regard to the variety of individual motivations -like most economic models. Yet, it is precisely that simplicity that makes it easier to assess the nature of social inter-dependence and propose concrete -although imperfect- solutions to the problem. However, when this simplicity is taken as an absolute truth, which in theological language is 'idolatry', then the contribution becomes insignificant.

that food is not merely a commodity, that production cannot be solely limited to short-term profits of producers, and that exchange is not just an instrument of individuals. They all have their intrinsic values that transcend their instrumental role. But even when considering intrinsic crucial variables –for which ethics’ contribution is pivotal–, the instrumental role cannot be diminished, particularly because such an instrumental role is always influencing the intrinsic value as well (ibid.:10). Therefore, Sen does not argue in favour of an ethical approach in economics that, by ignoring the engineering dimension, also limits economics in itself and turns it unproductive. Conversely, for Sen, ‘economics, as it has emerged, can be made more productive by paying greater and more explicit attention to the ethical considerations that shape human behaviour and judgement’ (ibid.:9).

Sen expands his argument about the need for a balanced technical and ethical economic approach when analysing the notions of ‘rationality’ and ‘self-interest’ (ibid:10-28). Self-interest maximisation, as the only rational motivation to act economically, cannot be addressed as a universal truth in economics without the risk of falling into absurdity.<sup>153</sup> Although some economists such as Stigler (1981) have defended the self-interest theory with quite well-articulated arguments, claiming even empirical evidence, Sen proves that those arguments are ‘based on some special theorizing rather than on empirical verification’ (Sen 1988:18). For instance, the success of Japan’s free-market was claimed to prove the self-interest theory, but such a success actually proves nothing about the ‘motivation’ behind Japanese economic agents. In fact, as Sen shows, there is ‘strong empirical evidence to suggest that systematic departures from self-interested behaviour in the direction of duty, loyalty and goodwill have played a substantial part in [Japanese] industrial success’ (ibid.).

Similar examples are given by Kohn (2008) in his book about self-interest and trust. Kohn depicts the difference between the development of North and South Italy. The efficiency of the Northerners has nothing to do with self-interest behaviour, as generally assumed, but rather with trust and the notion of a common ground to which all need to contribute and care. Conversely, the Southerners inherited a ‘family-trust’ system fostered by the Catalonia Empire while they were ruling the area. This system is based on the distrust of public institutions and on the determination to follow self-interested values. As Kohn explains, when there is neither trust in public institutions nor in common basic social values, individuals tend to rely on their kin. However, while trust abounds within the family/group with same vested interests, such trust

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<sup>153</sup> For this reason, as will be explained in Part II when addressing the capabilities approach, Sen (1999) proposes a shift in the basis of economic ‘rationality’. Instead of being focused on ‘preference satisfaction’ (hence unlimited desires), as utilitarian economics does, he argues in favour of ‘human functionings’, which reflect more accurately the actual reasons why people produce and consume goods.

does not exist beyond that group. Moral obligations, therefore, are concentrated within small groups, but often at the expense of the rest of the society. This is called the 'familistic' or 'mafia' approach, still present in South Italy (ibid.:80), which undoubtedly hinders economic development.<sup>154</sup>

What is interesting is that Sen does not deny the validity of the use of the notion of 'self-interest' in economics, so long as it is properly understood in terms of Adam Smith's actual conception. Members of a family, a group or a society often have conflicting interests, and people do act with a mix of selfish and selfless intentions (Sen 1988:20). Therefore, it is neither true that people's motivations are exclusively selfish, nor that such an assumption was promoted by the father of liberalism. Sen clarifies that in the *Theory of Moral Sentiments* (1790:189), Adam Smith describes prudence as the virtue that connects reasoning and understanding with self-command. The latter is rooted in the Stoic notion of discipline, by which an individual shall always consider himself as a member of a 'vast commonwealth and nature' and not merely as an isolated person; hence, in 'the interest of this great community, he ought at all times to be willing that his own little interest should be sacrificed' (ibid.:140).

By this explanation and others (see 1988:22-28), Sen contends that when the self-interest described by Smith is separated from his notion of prudence, the concept is totally distorted. This distortion leads to misinterpret 'Smith's complex attitude to motivation and markets', as well as to neglect his 'ethical analysis of sentiments and behaviour'. For Sen, this misinterpretation 'fits well into the distancing of economics from ethics that has occurred with the development of modern economics' (ibid.:27-28). Far from being a merely academic discussion, this has had serious practical implications. For instance, and resuming the famine example, Sen recollects that Smith was often cited by imperial administrators as a justification for refusing to intervene in famines in such diverse places as Ireland, India and China. However, 'there is nothing to indicate that Smith's ethical approach to public policy would have precluded intervention in support of the entitlements of the poor. Even though he would have certainly been opposed to the suppression of trade, his pointer to unemployment and low real wages as causes of starvation suggests a variety of public policy responses' (ibid.:27). We can see how, for Sen, a real liberal economy does not belittle ethical discussions that go beyond technicalities.

In short, it is a wrong assumption to identify rational self-interest maximisation in economics with material selfishness and ethical egoism. Even from the economic-engineering point of view,

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<sup>154</sup> See also R. Putnam (2000) and his distinction between *bonding* and *bridging* social capital. While the former refers to cementing bonds between homogeneous groups, which can hinder social cohesion, the latter implies the relationship between heterogeneous groups, which establishes a better basis for civil society.

such an assumption proves to be misleading. Indeed, Sen questions what kind of economic success would an exclusively self-interested driven economy eventually achieve (ibid.:21). For economics, there are two main definitions of efficiency: '(1) "technical efficiency", requiring that no more of any output can be produced without producing less of some other output (treating inputs as negative outputs); and (2) "economic efficiency", identified with 'Pareto optimality', which requires that no one can be made better off without making someone else worse off' (ibid.). It may be appropriate to take the latter when considering only 'the space of utilities'. However, it 'is unfortunate' when 'the whole focus of analysis' is restricted to utilities -a legacy of utilitarian tradition (ibid.:33). For example, 'a state can be Pareto optimal with some people in extreme misery and others rolling in luxury, so long as the miserable cannot be made better off without cutting into the luxury of the rich... In this regard, and by paying no attention to interpersonal comparisons of utility and to distributional considerations, Sen argues, 'Pareto optimality can, like Caesar's spirit, come hot from hell' (ibid.:32). Thus, economic technical efficiency, when taking into account interpersonal comparisons and distributional considerations, needs to go beyond technicalities and include ethical considerations, something often and paradoxically omitted in economics, even in welfare economics.<sup>155</sup>

Sen emphasises the need for a wider ethical analysis in economics by means of showing neo-classical economics' contradictions due to its utilitarianism and to its restricted understanding of *freedom*. For Sen (1999), freedom is crucial for both the assessment of economic development - which needs to go beyond other variables such as the rise of personal or national income, or technological or industrial advance- and for the evaluative reasoning of economic agents. Yet, given that there is no unique criterion to assess this understanding of development as freedom, nor to evaluate the reasoning of free socially-embedded individuals, processes of socio-political ethical discussions to decide how to advance freedom are crucial. But, for Sen, the freedom of agents and their values cannot be seen in isolation -as some economic theories are-, because they are intricately carved in community participation and socio-cultural beliefs. In fact, Sen is well aware of the 'deep complementarity between individual agency and social arrangements', and defines 'individual freedom as social commitment' (ibid.:xii). He acknowledges 'the role of social values and prevailing mores' as influencing 'the freedoms that people enjoy and have reason to treasure' (ibid.:9). Thus, economic efficiency assessments cannot ignore social and

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<sup>155</sup> For an account of Sen's critique and contribution to welfare economics, see Atkinson (1999). For a thorough analysis of Sen's contribution to economics, see Pressman (2001). For an explanation on Sen's contribution to development economics, see Desai (2001). For analogous arguments regarding economic efficiency, particularly on the 'non-existence' of an efficient market equilibrium, see Grossman and Stiglitz (1980).

political variables, involving a variety of institutions and agencies influencing individual freedom, such as Christian churches in Latin America.

#### 4.2.3. CST invited by economics to dialogue

In previous chapters (1-3) we have theologically analysed how and why CST method is well equipped to enter into dialogue with social sciences in general and with economics in particular. In this chapter, we studied how the neo-classical economic method has evolved in the last decades, and why present economics is not closed to ethical, cultural or even religious approaches. This means that, in terms of methodology, either from a theological or an economic point of view, the dialogue between economics and CST is potentially feasible. Yet, to actualise such a dialogue, and considering the varieties of economic schools at present, we have taken Amartya Sen as a concrete eventual interlocutor. For him, economics has a technical and an ethical dimension that need to be held together. Economics is about the production of wealth, but also about how to integrate that wealth with other human goals and values, religious ones included. This, Sen argues, is not merely necessary in order to assess individuals' behaviour and motivation -pivotal for economic analysis-, but also to aspire to actual economic efficiency, which ought to be appraised in terms of human freedom and wellbeing.

If economics is inextricably related with freedom and with public reasoning processes in which peoples' values and beliefs can be voiced, it is fair to conclude that economics, at least as Sen conceives it, is open to interact with socio-ethical-religious approaches such as CST. CST, as representing what one billion Catholics *do* value in terms of social life, cannot but have a voice in such a public intercourse.

Prima facie, Sen's approach, based on the centrality of freedom, the ethical understanding of economics, the centrality of culture and beliefs for the formation of the economic agent's conscience, does not seem incompatible with CST methodology and anthropology. In other words, and to resume the image with which we opened Part I (*The Boxers*), CA and CST do not seem to be boxing opponents trying to strike each other. Rather, despite the methodological difficulties and seeming incompatibilities of both disciplines underpinning CA and CST, there are sound reasons to believe they can be argumentative friends. Whether this movement from hostile rivalry to cordial discussion -as depicted by our interpretation of *The Boxers*- can be executed, remains to be seen. In order to explore this possibility, Part II will study in detail Sen's ideas of 'development/freedom' and 'wellbeing/justice', and question to what extent they can combine with those of CST.

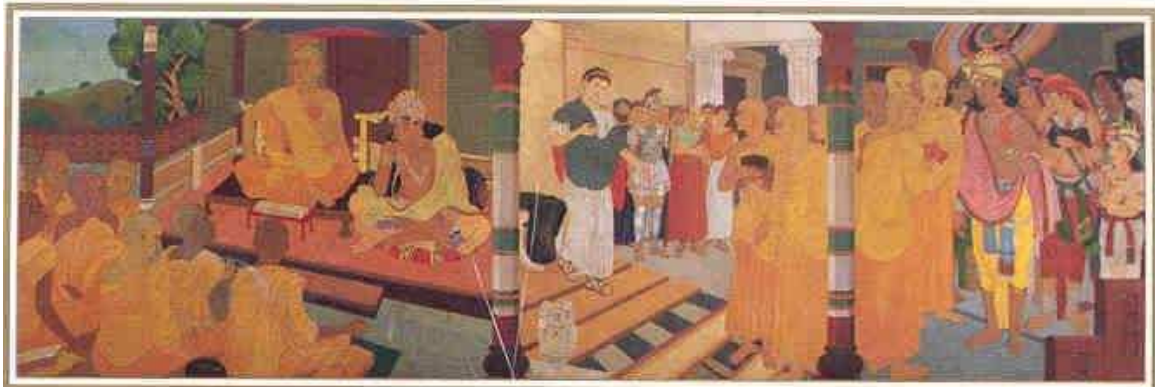




## Part II: Amartya Sen's CA: open to dialogue

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### Introduction: *Indian mural*



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These are three pictures from a mural (3<sup>rd</sup> century B.C.), now located in the Indian Parliament House, Rajya Sabha. In the picture on the left, the Buddhist emperor Ashoka sends out missionaries to other countries, with the 'peculiar' target of promoting dialogue and inter-cultural and inter-religious relations. Their Buddhist identity was not believed to be endangered due to such openness, but rather expected to be enriched. In the middle picture, emperor Ashoka is meeting the Greek king (or kings), presumably Alexander the Great and his regional consuls. Monks are also part of the encounter, in which the vested interests of different reigns and religions were overtly discussed. In the third picture, on the right, Ashoka is taking part in one of the famous Buddhist councils, considered by many scholars as an important precedent of modern democracy. The range of colours and people depicted reflects the openness of the councils, which were established by the emperor to discuss, publicly, contrasting views and understandings of reality. In order to facilitate the councils' success, Ashoka issued some rules whereby diversity should be highly respected, and personal or tribal self-praise was discouraged (Sen 2005).

The mural can synthesise Part II of this Thesis. For Ashoka and his missionary monks, the role of their religious beliefs was not to impose their dogmas or faith, but rather to promote a

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<sup>156</sup> Picture 2: Jijja, Shri B.N. (artist) (artist supervisor: Shri Barada Ukil, Delhi). *Delhi Mural Paintings in Parliament House, Parliament of India, Rajya Sabha*. Available from: [http://rajyasabha.nic.in/rsnew/picture\\_gallery/mural/pan14.asp](http://rajyasabha.nic.in/rsnew/picture_gallery/mural/pan14.asp) Accessed on 29/01/2013.

dialogue about pivotal existential questions so as to help improve people's life. Similarly, for Sen and for those who endorse his ideas, economics should not dogmatically impose its assumptions on people's behaviour and rationality, but rather promote discussions on crucial questions concerning quality of life, so as to ease people's struggles with the scarcity of resources,<sup>157</sup> and assist people's endeavours in seeking wealth. This public discussion (or public reasoning, as Sen calls it), includes: (a) monarchs and emperors (those in power and issues concerning power); (b) spiritual leaders who reflect values other than strictly political or economic; and (c) ordinary people from different backgrounds and beliefs -as reflected by the third richly-coloured picture, in which not just the monks (left) and Ashoka (centre) have their say, but also colourful denizens such as peasants, women and workers (right).

We can give flesh to the mural painting and further the analogy by resuming our example of Araceli and Gustavo, a couple living in a slum in Greater Buenos Aires along with three children of their own, two children from Araceli's previous relationships, and economically supporting, despite their poverty, a disabled daughter of Gustavo who lives in Lima, Peru. Contemplating the first picture of the Buddhist missionaries going out in a dialogical mission, we might recognise the similar missionary element of Araceli and Gustavo's relationship. Each of them has gone beyond him/herself towards somebody completely different, whose nationality, habits and beliefs were, at the beginning, significantly strange for the other. Had Gustavo or Araceli believed that their identity as Peruvian and Argentinean, respectively, was at risk because of their openness to each other, they would have probably failed in their loving relationship. Regarding the second picture of authoritative discussions between Alexander and Ashoka and his monks, had Gustavo been closed to discussions about Araceli's Catholic beliefs, particularly with an authoritative person such as the parish priest, their relationship could have suffered, maybe even ended. Gustavo might have considered his wife fanatical or irrational. The priest's nuanced views always left room for further discussions, aiding the sceptic Gustavo to deal with Catholicism. Likewise, had Araceli been closed to secular issues, she would not have considered questioning her faith, and would have become more intolerant of her husband's criticisms of her religion. Such intolerance would have been devastating for the relationship, particularly considering their tendency to discuss forcefully, meshed with Araceli's sensitivity to any violent gesture due to her experiences in previous relationships, where she was physically abused while being bullied because of her religious beliefs. Finally, and with regard to the third picture about the public councils, Araceli

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<sup>157</sup> As clarified in 4.1, although the economic idea of 'scarcity' is contested, such a debate exceeds the scope of our thesis.

and Gustavo have been lucky enough to find a parish in which councils do matter.<sup>158</sup> Although imperfect, they help to provide parishioners with a sense of ‘agency’. Even Gustavo, a religious sceptic, is a strong supporter of these councils, especially when they address issues about water, the contamination of the river that flows alongside their neighbourhood, the situation of the school and of teenagers at risk, and other topics of social concern. Such Parish Councils, in which a great variety of people take part, have proved to have a considerable impact on the Municipal Council’s decisions.

Going back to the three pictures of the mural, they can also help us to structure this Part II. Just as the mural starts with Ashoka and his monks’ mission, this Part starts by introducing “Sen’s economic mission”. The *first* chapter traces Sen’s ideas back to his childhood and early formation -where we find a religious connection-, and chronologically introduces Sen’s main contributions to economics, from his challenging notion of welfare in the 1970s, through the development of his Capability Approach (CA) in the 1980s and 1990s, to his idea of justice during the new millennium. *Secondly*, as the mural focuses on Ashoka and Alexander in what might have been an extremely interesting discussion of contested views, all witnessed by the Buddhist monks, so the second chapter addresses the CA and its most significant critics. *Thirdly*, just as the mural portrays the colourfully diverse public councils, symbol of the promotion of justice, the third chapter depicts Sen’s idea of justice. *Finally*, just as the mural introduces interlocutors in the public arena, this Part II will conclude with a list of topics on which, in an imaginary public discussion, Sen’s approach can confront Catholic social ethics. By highlighting the main points on which Sen and CST agree and disagree, this last chapter will open the door to Part III, where we explore how CST and CA can interact and be mutually enriched regarding the analysis of economic relations and the promotion of development/freedom and wellbeing/justice.

Still, as Sen (2009:87-88) points out, we are aware that discussions are not always effective. For example, the dialogue between Alexander the Great and socio-religious leaders in India, although a step forward in the processes of public communication, crucial for justice, did not change interlocutors’ views (ibid.:88). Our hope is to avoid this pitfall, and expect the discussion proposed herein to serve as a basis for the development of the CA and CST’s views and, more importantly, for social transformation.

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<sup>158</sup> Not all parishes in slums in Buenos Aires have influential ‘parish councils’. Nonetheless, as evidenced by the studies edited by Léopore (2012), some do.

## 5. Chronological coordinates

It is worth insisting that this thesis does not attempt to summarise the vast and large contribution of Amartya Sen to development economics and political philosophy. Such an endeavour would require, at least, a thesis in itself. Besides, there are many publications which offer a clear picture of Sen's main ideas. To mention just a few, Morris (2010) has edited a series of essays from experts on Sen, including, among others, Sabina Alkire, Ingrid Robeyns, David Crocker and Philip Pettit. They review the core of Sen's work regarding: (i) preference, choice rationality and social choice theory; (ii) ethics and economics; (iii) capability, agency and freedom; sufficiency and equality; (iv) famine, poverty and property rights; and (v) the notion of development. Sanchez Garrido (2008) delves deep into Sen's intellectual roots, and discovers how Aristotle, Adam Smith and Karl Marx have a substantial influence on Sen's thoughts. He argues that the outcome of his research can be used as a helpful basis for an intellectual biography of Sen. Alkire (2002) analyses the value of freedom according to the CA. Deneulin (2009) offers another edited collection on human development and the CA. Written in accessible language, with examples, charts and case studies, it provides a clear introduction to Sen's work. Martha Nussbaum (1995, 2000 and 2011) develops her own notion of capabilities and human-development, skilfully explaining the difference between her and Sen's approach. Ingrid Robeyns (2003, 2007 and 2010) examines Sen's work through the perspective of gender, and, alongside Agarwal and Humphries (2005) has edited a collection of articles on the matter. Also, Robeyns with Brighouse (2010) edited another rich collection of essays on the CA as a measure for justice, including issues on education and disability. In this regard, it is worth mentioning the work of Lorella Terzi (2005, 2008, 2009 and 2010), who has studied educational equality for children with disabilities and special educational needs through the CA, and also Elaine Unterhalter (2003, 2005, 2010), who has investigated the link of the CA with gender discrimination in education. Lawrence Daka (2008), as mentioned before,<sup>159</sup> has described in detail the link between Sen and Rawls, and appropriated the CA to assess Zimbabwean land reform. Basu and Kanbur (2009) edited two extensive volumes containing essays in honour of Amartya Sen. They maintain that Sen and his commentators have arguments which can improve the state of affairs of our present world, and they have divided the publication between 'ethics, welfare and measurement' and 'society, institutions and development'.

Notwithstanding the quantity of Sen's interpreters and critics, it is difficult to situate Sen and his work chronologically, especially regarding the relation between his work and the realities he is

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<sup>159</sup> See the Introduction of this Thesis (Literature *status quo*).

responding to. This chapter attempts to fill this gap, helping the reader to have a clear picture of the evolution of his ideas and their relation to liberal globalisation. Also, a chronological map facilitates theological approaches, such as CST, to enter into an honest discussion with Sen. Particular points about such discussion and connection will be highlighted during the explanation of Sen's ideas, as helpful landmarks on which we can situate the debate later on.

## 5.1. Schooldays

### 5.1.1. Tagore's education

Sen was educated at Santiniketan (West Bengal, India), an unusual school founded by the Bengali Nobel laureate in literature, Rabindranath Tagore, and where Sen's grandfather and hero, Kshiti Mohan Sen, used to teach Sanskrit, Hinduism and the interpretation of classical religious literature and other devotional poetry (Sen 2005:45).<sup>160</sup> Despite the odd facilities and other peculiarities, the school was rich in science, literature and humanities (ibid.:115). The emphasis there was on 'self-motivation rather than on discipline, and on fostering intellectual curiosity rather than competitive excellence' (ibid.:114), which says a lot about Sen's intellectual history. Moreover, 'the school's celebration of variety was also in sharp contrast with the cultural conservatism and separatism that has tended to grip India from time to time' (ibid.:115). Such variety has had a tremendous impact on Sen and other alumni, such as the famous film-maker Satyajit Ray, who have been able to combine, since schooldays, eastern and western culture, hard sciences with humanities, religious traditions with reasoning, and, most importantly, *development with freedom*.

For Tagore, indeed, 'freedom of mind is needed for the reception of truth; terror hopelessly kills it', as he once explained in reference to the Russia of the 1930s (ibid.:113). He tried to instil this idea into his school, which Sen attended, where 'it was of the highest importance that people be able to live, and reason, in freedom' (ibid.:98). It is precisely his understanding of freedom that made Tagore a fierce opponent to extreme nationalism, a hardened sceptic about patriotism (ibid.:105-9), and an admirer of the post-WW II Japanese development model based on education and freedom, as opposed to the Chinese model, based on control and power (ibid.:109-11).

Tagore's discussions with Gandhi were well known. Among the many issues on which they disagreed, two of them stand out: icons<sup>161</sup> and nationalism. Gandhi had the view that nationalism was needed so as to reach internationalism, as war is sometimes needed to reach

<sup>160</sup> The fact that his grandfather taught religion with a very open-minded attitude, always promoting critical analysis to religious matters, has had a tremendous impact on Sen's mind-set.

<sup>161</sup> Although Sen calls them "idols", due to the strong theological significance of idols, we prefer to call them "icons".

peace. Conversely, Tagore did not believe in any strong division of nations, and preferred to emphasise the importance of cultural, thus also commercial and political, inter-dependence (ibid.:92). With regard to icons, while Gandhi was of the opinion that they were useful for great social achievements, helping the masses to envisage abstract ideas, as, for instance, the European flags bearing eagles used to do, Tagore abhorred the manipulation of masses and preferred to give more room to reason rather than to tradition or iconic idols (ibid.). Yet, as Sen explains, this does not mean that Tagore rejected religion or tradition altogether. Indeed, 'the idea of a direct, joyful and totally fearless relationship with God can be found in many of Tagore's religious writings, including the poems of Gitanjali' (ibid.:96). But his religious vision was never severed from human ambiguity, from cultural and political issues, and from science and knowledge (ibid.:97-98). Tagore's view on freedom and religion are fundamental to the understanding of Sen's ideas on development as freedom, and on a secularist society which admits religious voices so long as they can be expressed through reason in public debates, not imposed through faith over those who do not believe.

In addition, Tagore's views and their influence on Sen are essential so as to link Sen with CST. For the Catholic tradition, indeed, faith and reason (*Fides et Ratio*, 1998), and liberation and revelation (Lk 4:16-21) are supposedly meshed as well. Moreover, CST does not conceive human development as a neat process towards perfection, but rather as a process full of ambiguities, as will be further explained in Part III.<sup>162</sup> Because the attempt to understand human ambiguities is, we argue, deeper in CST than in Sen's work, CST has a lot to contribute to Sen's view in this regard, or put better, it can help to uncover Tagore's original influence on Sen concerning freedom and religion. On the other hand, Tagore and Sen's notion of religion being fully embedded in cultural and political processes can aid CST to resume its Biblical grounds,<sup>163</sup> where culture and politics cannot be omitted when discovering and promoting the Kingdom of God.<sup>164</sup>

### 5.1.2. Sanskrit poems

When young, Sen was vastly enriched by the Sanskrit Hindu poems, some of which, such as the *Bhagavad Gita*, have been noticeably influential in his later work (2005:8). This book is one of the Sanskrit two great epics of ancient India,<sup>165</sup> and is actually a small section of the *Mahabharata*, a treatise of great "theological" importance in Hindu philosophy, which, we argue, has a threefold impact on Sen.

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<sup>162</sup> See Chapter 10 and 11.

<sup>163</sup> See Chapters 1- 3.

<sup>164</sup> For a short explanation of the Kingdom of God, see Chapters 1;10. For a connection between the Kingdom and economics, see Chapters 2-4 and Part III.

<sup>165</sup> The other great epic is the *Ramayana*, which would be the equivalent of the *Odyssey* and the *Iliad* to ancient Greece, although they 'are colossally longer than the works that the modest Homer could manage' (Sen 2005:3).

Firstly, the question Maitreyee poses to her husband Yajnavalkya about the merit of wealth, in the context of problems and predicaments of human life ('what should I do with that by which I do not become immortal?'), has been extremely useful in shaping Sen's understanding of economic progress as something beyond the GDP (1999:13-15).<sup>166</sup> Moreover, the quality of the discussion and debate of the Sanskrit ancient poems, along with their emphasis on reasoning and tolerance, has also proved to be quite influential on Sen's notion of human development, only truly achievable through public reasoning in a secular –though tolerant- society (2005:19). The identification of theological dialogues as key elements in the development of Sen's core ideas, adds weight to the purpose of this research, where we attempt to set up a dialogue between Sen and Catholic theology. Both in Sen and CST, the initial language used to address the struggles of people's lives and search for wellbeing and justice are ancient poems or parables. This literature genre facilitates the debate commencing with ordinary situations of life, with which people can easily identify themselves, whether directly or indirectly. Still, the aim of this literature genre is not merely to connect pivotal life questions regarding wellbeing and justice with ordinary life, but also, and most importantly, to reveal that ambivalent situations where injustice prevails are not the final fate of human existence. Because those situations can be redressed through processes of actual freedom, human development or flourishing is possible.<sup>167</sup>

Secondly, the moral debate taking place on the eve of the great war which is central to the *Mahabharata*, between Krishna and his 'emphasis on doing one's duty', and Arjuna and his 'focus on avoiding bad consequences (and generating good ones)' introduced Sen to deontology and consequentialism (ibid.:4). In fact, Arjuna is a great warrior fighting for a good cause on behalf of the royal family (the Pandavas), and against the Kauravas, unjust usurpers. Still, he questions 'whether it is right to be concerned only with one's duty to promote a just cause and be indifferent to the misery and the slaughter –even of one's kin- that the war itself would undoubtedly cause' (ibid.). Krishna, a sort of avatar, dismisses Arjuna's doubts by grounding the principle of moral actions in principles of duty (*deon*). Finally, after a great debate, Krishna's deontology wins the argument over Arjuna's consequentialism, something that troubles the young Sen.

Later, as a student in Cambridge, Sen would find the answer to his disquieting feelings as a young reader of *Bhagavad Gita*. Through a closer examination of modern deontology (i.e.

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<sup>166</sup> We will address this topic in full when discussing the capability approach in Chapter 6.

<sup>167</sup> See Chapters 1;9-10, particularly the explanation of the importance of talking in parables when trying to communicate the new reality of the Kingdom of God; and why the parables may promote creativity when dealing with unjust situations.



Kant) and moderate consequentialism, Sen discovered that those ethical views are not necessarily opposed to each other. Hence, Arjuna's observations need further elaboration, a reason for which Sen has developed a specific hermeneutic of the Arjuna-Krishna debate. For Sen, 'the tragic desolation that the post-combat and post-carnage land... seems to face towards the end of the Mahabharata, can even be seen as something of a vindication of Arjuna's profound doubts' (ibid.:5). Sen contends that Arjuna's arguments are not at all vanquished, because his point of 'faring well', and not just 'forward', not only remains intact within the story, but it has also produced compelling explanations throughout history based on the benefits of consequentialism (ibid.). Even if actions are based on principles, and even assuming those principles are good, as in Arjuna's case, consequences of actions can never be ignored if we want to analyse how actions promote or hinder a better life overall. This philosophical issue, which arose in Sen's early days, is extremely useful for our research. Virtue ethics, held by CST and grounded on Thomas Aquinas' understanding of morality, maintains, similarly, that in order to qualify an action as good, not just the object (action in itself) and the subject (intention or motivation) need to be good, but also the consequences of the action have a role in such qualification (*Summa Theologicae* I-IIae: 1-21<sup>168</sup>). In short, by tracking the influence of the Sanskrit poems regarding Sen's moderate consequentialism, we can discover common ground on which to buttress the dialogue between Sen and Catholic theology.

Thirdly, the Sanskrit poems have provided Sen with a solid case against gender and caste discrimination. The fact that certain pivotal questions of the *Bhagavad Gita* are posed by women has raised Sen's interest in the importance of gender issues, particularly in a philosophical-theological tradition in which men have had a significant predominance. Furthermore, when dealing with caste division, normally attributed to differences reflected in skin colour, Bharadvaja -another character in a notable dialogue- counter-argues by 'pointing to the considerable variations in skin colour within every caste ("if different colours indicate different castes, then all castes are mixed castes")' (Sen 2005::11). He also asks his rivals a question that resonates with some passages of the Bible:<sup>169</sup> 'we all seem to be affected by desire, anger, fear, sorrow, worry, hunger, and labour; how do we have caste differences then?' (ibid.). This non-discrimination approach has had a noticeable influence on Sen's thoughts, especially regarding the question of equality, pivotal to his notion of development (Sen 1980, 1992, 1997). While Sen's arguments for gender equality and against caste divisions seem to be in consonance with CST's notion of human dignity, as will be analysed later in Part III, his explanations on such topics certainly challenge

<sup>168</sup> 'Object, End and Moral Species' in *Summa Theologica* I-IIae, qq.1-21.

<sup>169</sup> See for example, Mt 5:45; Dt-16:19; Job 34:19 cc.

some elements of CST, particularly those concerning gender issues and justice. For example, the latest Papal encyclical on justice and human development, *Caritas in Veritate* (2009), falls short in addressing issues of maternal mortality, while it seems to be over concerned with problems around under-population rather than over-population (Beattie 2013).

### 5.1.3. Violent 'religious' experience

In several of his publications (e.g. 1999, 2005, 2007), Sen recalls the harrowing experience he had at the age of eleven, in 1944. Kader Mia, a Muslim labourer seeking desperately for a job in order to feed his family, was knifed by Hindu activists outside Sen's home in Dhaka. The bleeding worker knocked on Sen's door asking for help, and the child Amartya, who happened to open the door, was deeply shocked by the situation. The man died on his way to the hospital, where Sen's father had taken him (Sen 2005:209). Since then, Sen has developed an anti-violent approach to development, religion and society which comprises: (i) being against 'tough' progress that foments repression, confines public dialogue and hinders freedom; (ii) rejecting what he understands as fundamentalism or radical religion, which can drive people to murder, or which can confuse people concerning their identity, as if the religious identity were the only dimension to be considered; and (iii) buttressing a 'soft' secularism, in which public dialogue and toleration always prevail in the struggle to find communal solutions when competing interests clash - religious interests or values included. As stated with previous experiences of the young Sen, this episode needs to be seriously taken into account when proposing an engagement with Sen and religion.<sup>170</sup> Not only is it important for a proper hermeneutic of Sen's work, whose ideas are grounded in a particular socio-religious context, but also because Sen's teachings, as occur with CST, emerge from the experience of oppression and exploitation.

Later in his career, Sen will find, in two of the greatest Indian emperors, further arguments to support his version of secularism. Emperor Ashoka, in the third century BCE, supported Buddhist councils<sup>171</sup> which were 'primarily concerned with resolving differences in religious principles and practices', although they also 'addressed the demands of social and civic duties, and furthermore helped, in a general way, to consolidate and promote the tradition of open discussion on contentious issues' (ibid.:15). Those councils, with representatives from the whole Indian sub-continent, including what is now Afghanistan, 'took place without animosity or violence' (ibid.:16). In trying to formally organise the debate and promote fruitful public discussion, Ashoka codified some rules, such as 'restraint in regard to speech, so that there

<sup>170</sup> See also Deneulin 2009 and 2009b, who has a similar argument

<sup>171</sup> See the pictures of the Indian mural opening this Part II, where Ashoka and the councils are colourfully depicted.

should be no extolment of one's own sect or disparagement of other sects on inappropriate occasions, and it should be moderate even on appropriate occasions', or the strong recommendation to honour other sects when the argument escalates (ibid.).

This championing of public reasoning resonated two hundred years later, when the Moghul Emperor Akbar sponsored dialogues 'between adherents of different faiths, an element Sen sees as a germ of democracy (ibid.; 2004:352; 2007:51-55). Regardless of his Islamic devotion,<sup>172</sup> Akbar avoided a parochial approach to public policy, which normally tends to exclude different views, values and beliefs. Instead, the emperor opted for an inclusive and open approach, promoting inter-religious dialogues governed by the rule of the intellect (rahi aq'). This path of reason, even when expressing religious beliefs, was conceived by Akbar as 'the basic determinant of good and just behaviour as well as of an acceptable framework of legal duties and entitlements' (2009: 39). Such public dialogues led Akbar to be more interested in other religions while being faithful to his Islamic identity, a crucial point for Sen's later understanding of religious identity (2007:83). Akbar had even attempted –unsuccessfully– to launch a new religion which could include different teachings from diverse beliefs. The fact that Sen admires Ashoka and Akbar's dialogical religious approach is another point in favour of linking Sen's ideas with theological considerations.

## 5.2. 1970s

From an early stage in his successful career, Sen has shown signs of discontentment with standard models of economic theory. During the 1960s, for example, and alongside other economists such as K.N. Raj, Sen tried to ideate an alternative pattern to endogenous growth that can transcend the common tension (and subsequent discussion) on import substitutions and export promotion (1961).<sup>173</sup> Notwithstanding these contributions, it was in the 1970s that Sen's work began to stand out among economists.

In the early 1970s, Sen became deeply concerned with the development of economics, particularly in those indicators measuring social welfare (1970; 1973). He therefore initiated a thorough critique of the GNP (gross national product) and like methods which are based only on commodities, and started to ideate a more complex way of measuring progress, one that can have a wider view of human beings than the orthodox economic view, i.e. the 'homo

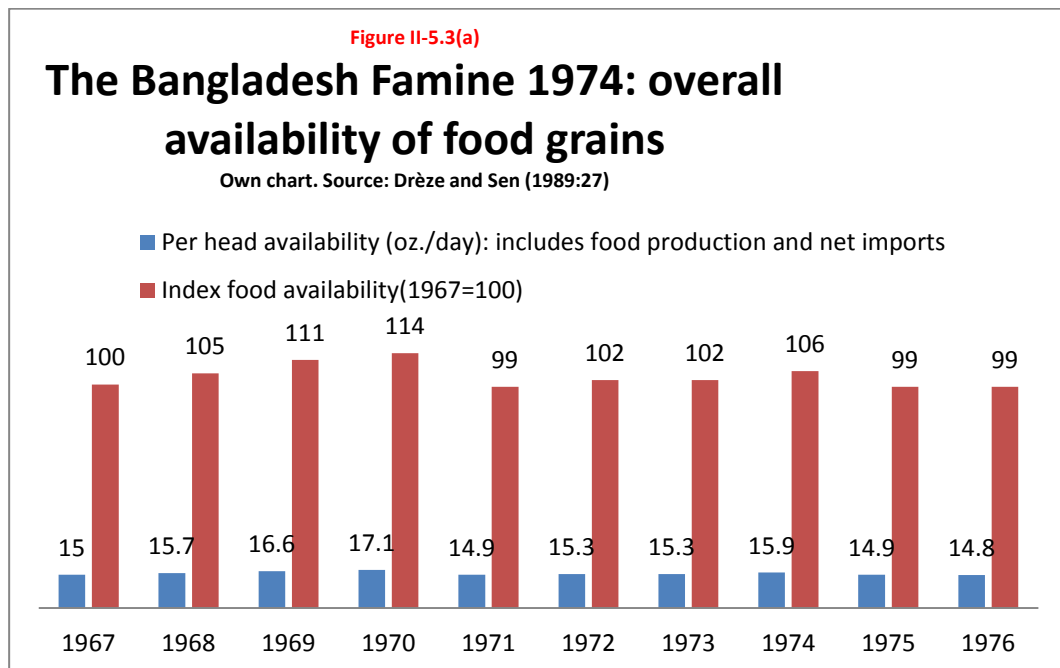
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<sup>172</sup> As Sen (2005) explains, Akbar is well known as a good Muslim, even by his critics, such as the Islamic theologian Abdul Haq, who despite having criticised Akbar for his 'lapses from orthodoxy', never denied Akbar's commitment to his faith and religion.

<sup>173</sup> For a further explanation, see Sen 2005:391.

economicus'. Still, the real motivation and actual origin of this concern is to be found in Sen's preoccupation with 'poverty' and inequality,<sup>174</sup> which has become paramount in his academic career. He is deeply interested in combatting such a social disease (1976; 1976b), and the first hint was to critically analyse and challenge economic evaluation techniques. A crucial outcome of this first piece of research was to confirm that the core intellectual problem with socio-economic measurements is the philosophy and anthropology behind it, namely, 'utilitarianism', which reduces economics to material growth -or the lack of it-, and human beings to cold and perennial 'maximisers'. Hence, Sen chose to dedicate the second half of this decade to finding an alternative ground for economics that could drive it beyond or away from utilitarianism (see 1973; 1976; 1977; 1979; 1979b; 1980)<sup>175</sup>.

### 5.3. 1980s



Early in the 1980s, Sen was able to neatly compile the relation between his outraged feelings on poverty and his philosophical enquiries, by examining some cases of famine (1981, Drèze and Sen 1989, 1990). As he has proved, the extreme poverty situation of famines is not necessarily fomented by scarcity of food, nor is human deprivation merely incited by the lack of

<sup>174</sup> Sen is not alone in his concern about the connection between inequality, poverty and development. Literature on present global inequality, and proposals on how it can be reduced, abound. See our selected bibliography on this topic in Chapter 12.2.4.

<sup>175</sup> For a recent collection of essays on the contribution of utilitarianism to ethics, see Eggleston and Miller (2014).

assets. As Figure II-5.3(a) shows, the availability of food in Bangladesh during 1974, the year of a devastating famine, was 6% higher than in any other year during 1971-6. Famines and similar situations are more likely related to the lack of freedom (e.g. a censored press, or the absence of democracy) -politically speaking-, and to the lack of food entitlements of individuals and groups - from an economic point of view-. Poverty, therefore, needs to be addressed in a more holistic way than the one proposed by utilitarian welfarists. For that to happen, Sen argues, economic analysis ought to seriously consider the quality of people's lives and not just measure how much they possess.<sup>176</sup> Thus, subsequent economic policies should aim at helping people to improve their quality of life, particularly those most affected by present inequalities, e.g. those living in poor countries (1981b).<sup>177</sup>

His contribution at this stage consists in challenging the whole understanding of welfare and its measurement,<sup>178</sup> bringing the individual and his broad choices to the centre of economic consideration. Sen delves deep into how people make choices and what really matters to them, and carefully examines people's parameters of behaviour, offering a wider understanding than the materialistic one of why the needy are more disadvantaged, and connecting the capacity of agency with rights (see 1980, 1981b, 1982, 1982b). Inevitably, this thought-provoking contribution prompts the question to the international forum regarding the road economic development should follow (1983, 1984, 1985b). But it was precisely the wide discussion he generated in political-economics, in academia and within international agencies of development such as the UN and The World Bank, that permitted Sen to enrich his ideas. In fact, the research done during the first half of the 1980s is a consistent basis for his better-argued and more compelling proposals of the second half, mostly around the same topics. Among them, four crucial pieces of work stand out: *Commodities and Capabilities* (1985), *On Ethics and Economics* (1987), *The Standard of Living* (1987), 'The Concept of Development' (1988b).<sup>179</sup>

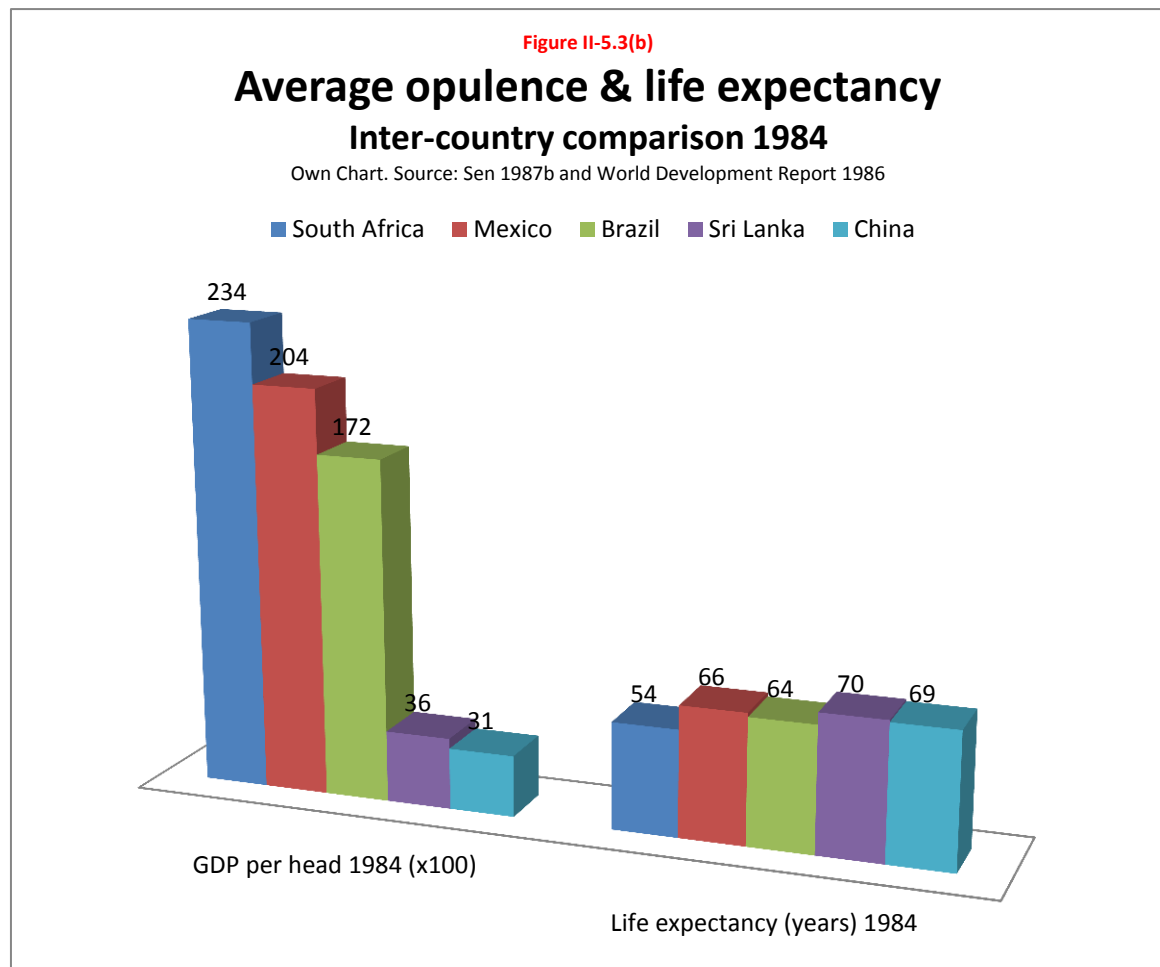
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<sup>176</sup> Similar arguments are found in CST. For *GS* (n.24), the human person cannot be consider an instrument, and for *Populorum*. (n.14) and *Caritas in Veritate* (n.11), the development of a person is never equivalent to her possessions.

<sup>177</sup> As it will be clarified later in Part II, we see here a strong link with CST, particularly on the emphasis of policies giving privilege to the most needy.

<sup>178</sup> For a summary of Sen's contribution to welfare economics, see Atkinson (1999).

<sup>179</sup> For more about *Ethics and Economics* see Chapter 4.2.



For Sen, the 1980s is a time to tender an alternative to mainstream economics.<sup>180</sup> Firstly, he attests the severe limitations of its utilitarian basis; secondly, he argues for a more comprehensive way of evaluating wealth and poverty. Economics, more than ever, needs to resume its ethical grounds (Sen 1988), and social welfare measurements need to include actual human values, not being restricted to mere material benefits. Likewise, the promotion of human development should go beyond commodities and seriously consider people's agency and freedom with which they can achieve a good life (wellbeing). To help in this promotion of human advancement, Sen starts ideating his CA (1985, 1985b, 1987b, 1988) which he will perfect in the following decade. 'Capability' becomes a technical term to express a kind of freedom with which a person can achieve various lifestyles and enhance wellbeing (Sen 1985:30; 1999:75).<sup>181</sup>

<sup>180</sup> In resonance to CST methodology of 'seeing-judging-acting',<sup>180</sup> Sen moves from: (i) *seeing* poverty -and reviewing what that undesirable human stage consists of-, to (ii) *judging* or analysing the intellectual causes that has produced poverty as it is now, i.e. the economic-utilitarian and anthropological limited view of human behaviour and choices, to (iii) finally proposing an alternative course of action (*acting*), his Capability Approach (CA), as is described in the next paragraphs.

<sup>181</sup> See our thorough explanation of capability and its relation to freedom and wellbeing in Chapter 6.

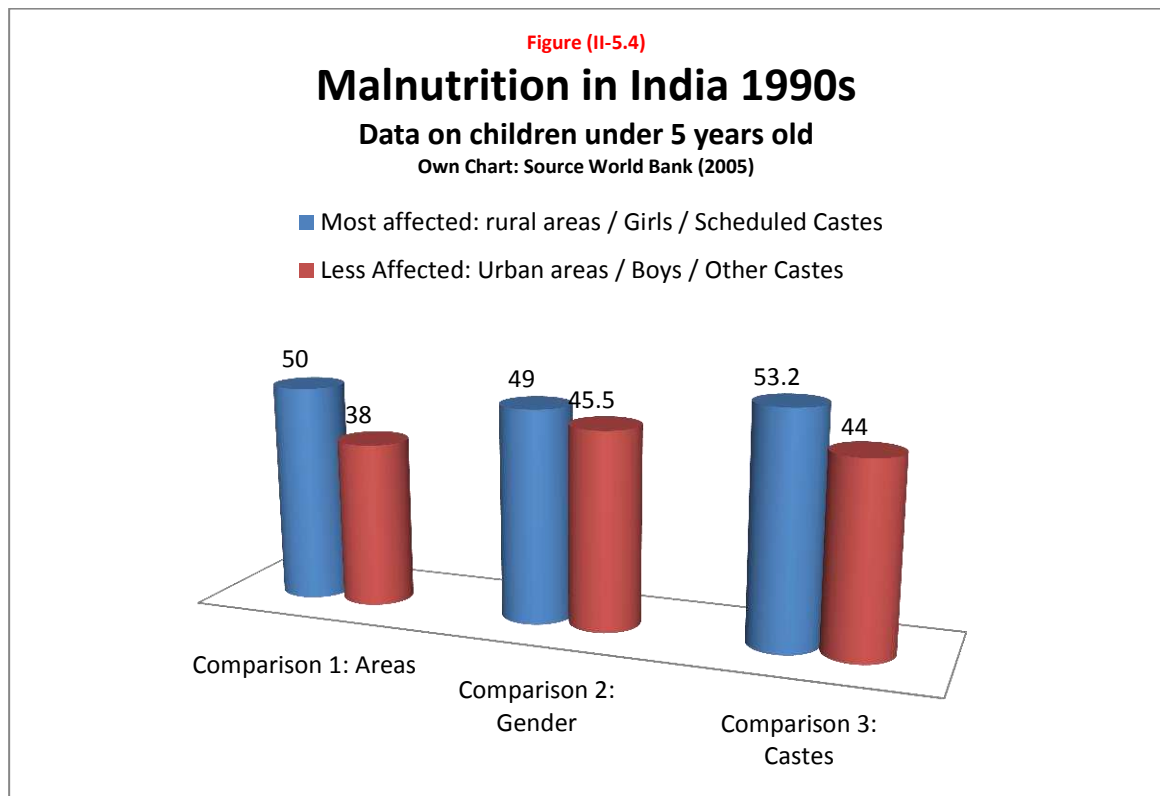
The CA provides a more accurate way of measuring poverty and wealth by combining different variables, as reflected in the Figure II-5.3(b) above, regarding GDP and life expectancy in developing countries. Despite being rich in GDP, South Africa, Mexico and Brazil had substantially less length of life expectancy than the poor in Sri Lanka and China. The material resources of the former group of countries were not translated into people's capabilities, so as to avoid premature death. Conversely, regardless of their limited resources, China and Sri Lanka, with appropriate public policies, were successful in enhancing the length and quality of life of their population.

In short, the Sen of the 1980s, by proposing a serious economic alternative through the opening of economics to ethics, by widening the anthropological notion on which mainstream economics is based, and by introducing the distinctions between wellbeing, agency and freedom and his CA, has opened a 'Pandora's box' in economic development, fostering some substantial changes in both international and local economic policies (Morris 2010). However, this oeuvre on more humane economics has inevitably given rise to deprecating criticism,<sup>182</sup> which for Sen is always an opportunity for further exploration and research. The question that will lead his thought during the next decade will be about 'freedom', which subsequently will raise the question about competing conceptions of freedom and justice. The former will find a response in the 1990s, the latter during the new millennium.

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<sup>182</sup> See Chapter 6.5.

## 5.4. 1990s



Perhaps due to Martha Nussbaum's influence,<sup>183</sup> in the first half of the 1990s Sen started to further analyse gender inequality and discrimination, which resulted in a reconsideration of his CA and of his work on equality, freedom and wellbeing (1990; 1990b; 1992; 1993; 1993b; 1994b). After the fall of the Berlin Wall in 1989, economics made a move towards a 'pure capitalism'. Although this decade shows a sharp increase in wealth worldwide, inequalities also escalated to unprecedented levels (Stiglitz 2013). Through the lens of gender (Lipsitz Bem 1993), Sen was better equipped than previously to question which *kind of equality* political-economics should be seeking (1992; 1996; 1997; 1997b; 1999; 1999b). For example, as Figure II-5.4 illustrates, despite

<sup>183</sup> Sen's ideas have been noticeably shaped by a number of significant women in his life. His first wife, Nabaneet Dev Sen, a well-known international scholar and writer, specialised in Sanskrit literature, aided Sen to maturely root his schoolday connections with Sanskrit poems and religious myths. They got divorced when Sen moved to the UK in the 1970s. Sen's second wife, Eva Colorni, was the daughter of one of the most influential neo-Marxist (Gramscist) Italian thinkers, through whom Sen was re-introduced to Marx. Eva died from cancer, and Sen's experience of being a single parent of two young children has raised empathy with women's concerns. Although not married, Sen's relationship with Martha Nussbaum had a definitive influence. Her Aristotelian and classic background has greatly contributed to Sen's view of ancient Greek philosophy. His current wife, Emma G. Rothschild, a British economic historian and professor at Harvard University, has given reassurance on the mission of economics as a social science, and the pivotal role Adam Smith can still play in fostering this mission (see Rothschild 2001 and its resonance with TIJ). For more about the influence of women on Sen's work, see Sanchez Garrido (2008). For more on women and development, see Nussbaum (1999).



a sustained increase in India's GDP during the 1990s, levels of undernourished children appeared worse than poor neighbouring countries. Women, Sen discovered, were more affected than men.

In addition, feminist perspectives assisted Sen in exploring more closely the importance of individual and social action, required for the achievement of personal wellbeing and social justice respectively. Indeed, during this decade, feminist movements were consolidated, forging socio-political changes worldwide, partly by making gender discrimination more apparent. When applying the perspectives of these movements to international development, challenging questions arose such as: how could development economics and its movements assist people to seriously consider poverty discrimination and to ameliorate it? Which kind of political-economic system, grounded on liberty, can improve people's lives and promote actual justice? (1990b; 1992; 1995). If freedom were to be a crucial idea for this decade, not only for women but also for the markets, a thorough scrutiny of the relation between freedom and human needs was urgently needed (1994b; 1996c; 1999). Just as feminism questioned the extent to which women are free in a patriarchal society, so too did Sen question the extent to which markets (and people) are free in a capitalist global order. What do we understand by 'freedom'? How are the markets related to individuals and their capabilities and wellbeing? Should the markets and globalisation be limited? By whom? Who are the beneficiaries of the globalised socio-economic and political world? Is it possible to promote economic development for the benefit of all humans? Sen attempted to address these conundrums during the 1990s (1993; 1993b; 1994b; 1996c; 1999).

Gender movements were not alone in stimulating Sen to refine his ideas on development as freedom. The global overproduction of goods –needed for the substantial increase in commerce and wealth– impelled economists and other experts to carefully analyse the urgent necessity for environmental care and its relation to human development (1995b; 1999). Also, the hyper globalisation trend, which was forging a new and somehow violent 'global' culture, forced a revisiting of the role 'culture' plays in fostering human wellbeing and economic advancement (1993; 1996b; 1999). Furthermore, given that issues about culture, gender, economic growth and global commerce cannot escape from the question about 'democracy', Sen initiated a line of research in this regard too. He has argued that democracy is a universal social value, rather than merely a legacy of or an imposition from the west (1990).<sup>184</sup>

However, as suggested before, the new millennium would be the time for Sen to deeply examine issues around justice and democracy. The 1990s had focused on 'freedom', which includes but is not restricted to democratic freedom. In fact, his most illustrious and influential

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<sup>184</sup> For more on Sen's notion of democracy as universal, not merely western, see Sen (2007) and Appendix 2.

book, titled *Development as Freedom* (1999),<sup>185</sup> synthesises his main ideas developed during this decade. The book was published a year after Sen was awarded with the Nobel Prize in Economics. The prize catapulted him into a sort of stardom among academics and policy-makers. Although this has attracted some personal criticism, it has fundamentally helped the dissemination of Sen's ideas. Ergo, many academics and policy-makers have found, in the CA, a friendly and efficient framework with which to deploy positive changes, not only in economics, but also in education, health care, political participation, cultural inclusiveness, etc. (Brighouse and Robeyns 2010, Basu and Kanbur 2009).

## 5.5. 2000s

Fame and popularity aside, the inter-disciplinary widespread worldwide research by Sen in the 1990s, opened and prompted concrete questions on justice in the years to follow. For example: is global justice an issue of 'inter-national' equality? Does globalisation help to open and widen people's choices and improve people's wellbeing? How does justice across borders operate?<sup>186</sup> As these questions cannot be answered without addressing the issue of 'democracy' and 'human rights', Sen needed to bring the prevailing theory of justice on board, namely, John Rawls's. During the first decade of the new millennium, Sen rethought Rawls' theory and questioned how it could be implemented in economic-development policies (see Table II-5.5 below and the titles corresponding to the 2000s).

Rawls led the moral and political discussion on justice for three decades, but Sen had been closely linked with his ideas since the very beginning, in the 1950s. As a student of mathematics, physics and economics at Trinity College, Cambridge, Sen was fascinated with Rawls' first attempt to throw light onto the debate on justice, titled 'Justice as Fairness' (1958).<sup>187</sup> Later in 1968, Sen and Kenneth Arrow had access to an earlier draft of Rawls's path-breaking book *A Theory of Justice* (1971), because they used it to give a joint lecture at Harvard University (TIJ:52-3). His excitement at Rawls' theory has permeated his work ever since. However, in the new millennium, when he had to develop the CA into an idea of justice, Sen felt the need to dissent

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<sup>185</sup> Given the importance of some books for the analysis of the evolution of Sen's ideas, i.e.: *On Ethics and Economics*, 1988 (EE), *Development as Freedom*, 1999 (DF), and *The Idea of Justice*, 2009 (TIJ), and considering the crucial links to CST that can be drawn from such books, they will be referenced by their initials rather than by author and year of publication.

<sup>186</sup> Other questions Sen's addressed during the new millennium are: is the East-West division hindering actual progress? Is it possible to promote public policies on social distribution in an ultra-liberal global environment? Who are the beneficiaries? Is there inequity in this regard; how to challenge it? Is the human rights approach enhancing justice?

<sup>187</sup> Rawls (2001) is a reviewed and edited version of this idea.

from Rawls on certain issues and decided, with respect, to improve on Rawls's theory (TIJ:53).<sup>188</sup> As Marx tried to correct Hegel's view of the ideal into practice, so Sen has attempted to correct Rawls' view of justice into a more practical one. Sen does not want 'justice' to remain in the realm of speculation about ideal structures that can permit, eventually, the advancement of a just society, just as Marx did not want philosophy to be restricted to speculative metaphysics which could, eventually, forge a good society, but rather preferred philosophy to be translated into concrete ethics which could generate actual change.<sup>189</sup>

Although the impact of TIJ, his *magnum opus*, remains to be seen, expectations are high. As DF has had an enormous influence on public policies, both globally and locally, in order to humanise development economics, TIJ could well be received likewise, furthering justice by redressing concrete injustices in the world. The need could not be clearer nor timelier. Justice is urgently required in our global society, and TIJ provides an intelligent and, most importantly, a feasible way of doing so. Indeed, ideal theories of justice, regardless of their veracity or consistency, are unlikely to be admitted and politically applied worldwide in the near future. Conversely, an idea of global justice coming from the liberal realm, derived from a compelling analysis of positive freedom already accepted –though partially- by international agencies of development, has a better chance. Still, as Sen clarifies, TIJ is only a starting point, a social expansion of his 'capabilities' framework. As such, it requires further research, especially from other disciplines such as law, politics, education, economics, psychology, sociology and, we argue, theology.<sup>190</sup> As argued before, because CST 'has an important interdisciplinary dimension', it can exercise 'a function of extraordinary effectiveness, because it allows faith, theology, metaphysics and science to come together in a collaborative effort in the service of humanity', displaying its 'dimension of wisdom' (*Caritas in Veritate*, 30-31).

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<sup>188</sup> For a further discussion on this topic, see Chapters 6.6., 7 and 12.

<sup>189</sup> For Marx (1841), indeed, the main contribution of Aristotle to ancient Greek philosophy was the shift from metaphysics into ethics.

<sup>190</sup> For a further explanation of this argument, see 3.4. See also Part I and Part III, where we explain *why* and *how*, respectively, this dissertation aims at engaging TIJ with CST in order to contribute to the development of a more just order in the present global system.

**Table II-5.5 Sen's intellectual history**

Decades	Topics	Titles (selected for the purpose of this chart)
1970s	Development & poverty indicators Social choice theory Criticism on welfarism Economic inequality	<i>Collective Choice and Social Welfare</i> ; 'On the Development of Basic Economic Indicators to Supplement GNP Measures'; 'Real National Income'; 'Rational Fools: a critique of the behavioural foundations of economic theory'. <i>On Economic Inequality</i> .
1980s	Equality (broad notion) Poverty and famine Quality of Life Capabilities, agency and wellbeing Ethics and economics Gender issues (first steps)	<i>Equality of What?</i> ; <b>Poverty and Famines</b> ; Utilitarianism and beyond; <i>Resources, Values and Development</i> ; Development: which way now?; <i>Commodities and Capabilities</i> ; Wellbeing, Agency and Freedom; <b>On Ethics and Economics</b> ; <i>The Standard of Living</i> , The Moral Standing of the Market, The Concept of Development,  Malnutrition of Rural Children and Sex Bias; Women, Technology and Sexual Divisions;
1990s	Gender & environmental issues Choice and freedom Wellbeing and agency Free markets Inequality: gender, economic, capabilities Development as freedom Justice (first steps): globalisation, public reasoning, democracy, culture	Gender and cooperative conflict; Environmental Evaluation and Social Choice; The Possibility of Social Choice; <i>Inequality re-examined</i> ; On the Status of Equality; From Income Inequality to Economic Inequality; <i>On Economic Inequality</i> ; Market and Freedoms; Capability and Wellbeing; Freedoms and Needs; Freedom, Capabilities and Public Action; <b>Development as Freedom</b> .  Gender Inequality and Theories of Justice; Justice: means vs freedoms; Global Justice: beyond international equity; Reason before identity; Democracy as a Universal Value; Our Culture, Their Culture;

**Table II-5.5 Sen's intellectual history (cont.)**

Decades	Topics	Titles
2000s	Justice	Social Justice and the Distribution of Income; Globalisation must be for all; <i>Rationality and Freedom</i> ; Justice Across Borders; Democracy and its Global Roots; Elements of a Theory of Human Rights; What do we want from a theory of Justice; <i>The Idea of Justice. An Uncertain Glory</i> (with Drèze)

## 5.6. Conclusion

As the above Table II-5.5 shows, this chapter has portrayed the development of Sen's ideas, from his early days at Tagore's School, where he supplemented the notion of religion and freedom received at home, to the new millennium, when he published his magnum opus: *The Idea of Justice*. We have explained the importance of his first publications in the 1970s on economics, social choice, welfare and inequality, and how his impressive research of the 1980s has widened the notion of classical economics by seriously considering people's wellbeing in the equation and by complementing mathematical economics with ethics. We have argued that his large output of the 1990s, when he shaped his CA and received his Nobel Prize, was the basis for his work on justice during the new millennium. Although the literature on Sen is prodigious, the novelty of this chapter consists in connecting Sen's well-known masterly work on development/freedom and wellbeing/justice, with his earlier socio-economic research and, most importantly, with some pivotal life-experiences which have marked the author's thinking.

By offering a picture of the evolution of Sen's ideas, this chapter has provided a sound basis for the dialogue proposed in this Thesis. It has shown that Sen's intellectual origin has strong religious connections, and that his notions of freedom and wellbeing, with which he has revolutionised economics, cannot be detached from the suffering of the most vulnerable. An economist with such a basis in religion and a convincing option for the poor, seems to be an ideal interlocutor with CST.<sup>191</sup>

From the analysis of the origin and basis of the CA, we can also infer some eventual contributions the CA can offer to CST. This chapter explained why self-motivation -rather than

<sup>191</sup> See Introduction of the Thesis

discipline- is pivotal for Tagore's education style, in which Sen was trained. Stories, poems or parables with a high theological content, questioning the meaning of human life –wealth included-, have motivated Sen in his understanding of development as freedom. The need for a cultural variety where people can deploy their intellectual freedom without being repressed by nationalism, or religious fundamentalism, or anti-religious secularism, is for both Tagore and Sen, the basis of a well-understood secularised society. For them, a truly free society needs to publicly discuss human values and ideas of progress, always containing ambiguous and contested views, always embedded in cultural and political processes, and always somehow dependent on the scientific knowledge of the time.

Using the debate between Arjuna and Krishna, the chapter also studied why Sen is inimical to uncritically accepting a deontological approach to ethics, opting to emphasise “the consequences” of actions so as to describe them as helpful or unhelpful for wellbeing. We have also examined the effect of Sen's childhood experience on his anti-violence convictions, resulting in his rejection of extreme religious views (fundamentalism) or development ideas ('tough' development<sup>192</sup>) that foment violence, and in the embracing of a notion of secularism which promotes dialogue and tolerance without necessarily neglecting religious values. Finally, the chapter also mentioned how Sen's relation with 'gender justice', particularly through his close-related women friends, has refined his idea of freedom and justice.

This basis of the CA can help CST to delve deep into its own notion of individual freedom that seeks 'the good' by persuasion rather than by imposition. This may encourage CST to go back to its origins and recover the story telling of the Parables of the Kingdom.<sup>193</sup> It can also provide new ideas for CST in its argument in favour of universal values that transcend nations and cultures but which are necessarily embedded in them. The CA can also galvanise CST into taking advantage of the philosophical recovery of virtue ethics for the study of human flourishing. Indeed, for virtue ethics, an obligation (*deon*) is something dynamic and related to the person. The object of human actions cannot be addressed without the analysis of the intention of the agent, his circumstances, and the consequences of his decisions, an argument that goes back to Thomas Aquinas. Moreover, the anti-violence of the CA can enrich CST theory of peace and war,<sup>194</sup> providing a convincing link with economic development and human flourishing. Furthermore, the CA can incite CST to address gender studies and secularism fruitfully, not merely in a negative way. Yet, to ensure that these potential contributions can be scientifically actualised, we still need to

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<sup>192</sup> For an expanded explanation see next Chapter.

<sup>193</sup> See Part III.

<sup>194</sup> For a synthesis of it see *Compendium*: 488-520.

investigate in detail Sen's ideas of development/freedom and wellbeing/justice. The study will allow us to refine the CA's compatibility with CST.

## 6. Development as Freedom

In the Introduction and Part I, we have accounted for having chosen Sen as a valid and enriching interlocutor to CST. In the first chapter of this Part II, we have offered some chronological coordinates depicting the evolution of Sen's ideas -always related to Sen's existential experiences-, which have helped us to weave the narrative between Sen and religious values, pivotal for the dialogue intended in this research. They may be considered as a basis upon which to build a proper understanding of Sen's main contributions to the social sciences. In this second chapter, we will further explore some of those contributions, particularly the notion of *development as freedom*. In order to do so, we will analyse in detail Sen's CA, which summarises the idea of freedom and its role in development-economic processes, and which opens the door for an understanding of *justice as wellbeing*.<sup>195</sup>

### 6.1. Introducing the CA

‘You could be *well-off*, without being *well*.  
You could be *well*, without being able to lead the *life you wanted*.  
You could have got the *life you wanted*, without being *happy*.  
You could be *happy*, without having much *freedom*.  
You could have a good deal of *freedom*, without achieving much’  
(Sen 1998: 1)

The CA is a liberal philosophical framework proposed as an alternative to what Sen considers inadequacies among existing economic, ethical and political theories as a way of assessing peoples' well-being (Daka 2008:72). Indeed, traditional economic and ethical evaluative theories, such as welfarism, utilitarianism and even Rawls's theory of justice, have wrongly portrayed human beings as self-interested by nature (TIJ:12-13). Aside from not taking adequate note of rights, freedoms, values and many other 'non-utility affairs' people have, utilitarianism, according to Sen, is also indifferent to the distribution of happiness, ignores inequality problems, and because it is concerned only with psychological or mental values in the state of affairs, it can easily be swayed by adaptation and mental conditioning attitudes (Daka 2008:37-39).<sup>196</sup> Consequently, in Sen's view, utilitarianism is incapable of assessing a person's actual wellbeing.

‘A person who has had a life of misfortune, with very few opportunities, and rather little hope, may be more easily reconciled to deprivations than others reared in more fortunate and affluent circumstances’ (EE:45). This is the case of the desperate beggar in Bogota, Colombia, or

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<sup>195</sup> See Chapter 7.

<sup>196</sup> For a positive account of utilitarianism, see Egglestone and Miller (2014). For a nuanced critique on it from Sen, in which he recognises utilitarianism's contribution to economics, see DF:61-61 and Sen and Williams (1982)



the precarious insecure landless labourer in northern Brazil, or the dominated housewife in Quito, Ecuador, or the hardened unemployed in Jujuy, Argentina, who 'may take pleasures in small mercies, and manage to suppress intense suffering for the necessity of continuing survival' (ibid.), or may even 'lack the courage to desire much' (ibid.:46). However, it will be 'deeply mistaken' not to consider their 'ill-being' due to their survival strategies (ibid.45-6). Because their deprivations are muted, this does not mean that a well-being assessment should undervalue them, as is normally the case with any utilitarian well-being measurement based on happiness or desire-fulfilment only. In order to correct those inadequacies, the CA proposes a 'primary informational base' with adequate information about people, focused on what they are able to do and on what they would reasonably want to achieve as human beings. Such basis allows one to assess the actual quality of people's lives, including their wellbeing and freedom (Sen 1993:38). In addition, the CA always questions the state of affairs by means of comparison, trying to identify which one is better, which state of affairs offers more freedom to people with which they can ameliorate their wretchedness.

But the CA cannot be defined merely in negative terms, i.e., as the opposite framework to utilitarianism, because it has vastly rich positive propositions, although sometimes expressed in a too sophisticated way. As Deneulin (2014) argues, the CA is characterised by some fundamental words such as wellbeing, functionings, capabilities, agency and freedom, which have generated a specific language or discourse in development studies and policies. This language has been properly construed by some experts in the field (e.g. Nussbaum, Alkire, Robeyns, et al.), as offering to economics a set of moral narratives and judgments with which to frame decisions concerning human development, both at an individual and socio-political level.<sup>197</sup> Thus, in order to introduce a short and clear explanation of the CA, we need firstly to analyse some of the key concepts that constitute its specific language. Secondly, we will briefly recall the main impacts the CA has had on international development, and the importance of applying it in economic development measurements and policies today. Finally, the main critiques of the CA will be analysed, highlighting the points on which the CA can interact with CST and its notion of human progress.

## 6.2. Functionings

The two main concepts that act as pillars of the building-language of the CA are 'functionings' and 'capabilities'. Sen takes the notion of functionings from Aristotle (Daka

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<sup>197</sup> See the Introduction of this thesis, and Chapter 7.2.

2008:72), for whom '*ergon*' is a function or achievement by which a person becomes virtuous by acting. The aim of human activity –and its functions– over a complete life is '*eudaimonia*', normally translated as happiness (*N.E.*,1.VIII). For Sen, in contrast, 'functionings' do not tell us just what a person is doing, her personal features (Sen 1984:317), but also depict 'what a person manages to do or be in leading a life', especially when we combine different functionings (DF:75). Hence, for Sen, 'functionings' can be defined as 'various things a person may value doing or being' (Sen 1997b:199, 1999d:7). This definition has been repeated or quoted by almost all academics who have studied Sen's work.<sup>198</sup> At first sight, and taken on its own, it sounds meaningless. What follows is an attempt to clarify this 'technicality', which can often mislead the reader not familiar with Sen's neologisms.

A first clarification is related to the subject of functionings. The fact that they tell us something crucial about individual behaviour does not mean that functionings are to be considered merely individually, i.e. focused exclusively on the individual and his choices, isolating him from the relationships and the context in which his choices are taken and his activities are performed. Precisely because 'functionings' evidence what an individual is doing in a given context, they are always contextual (Daka 2008:73). Therefore, their evaluation needs to take into account: (a) the values at stake of combined functionings –those of the individual and of his context; (b) the alternative functionings an individual may have in a given period; and (c) a comparison of the set of functionings of that individual with other peers (Daka 2008:73-74).

Through functionings, people translate their access to commodities into something meaningful to their life. A student, for example, needs to translate her access to education and books into knowledge and wisdom. Without such translation, we cannot assert that this student is better off than before his educational period, nor better off than those without access to education. Functionings are so crucial to our lives and reveal so much of our choices that, according to Sen, when assessing people's wellbeing for political-economic purposes, we cannot set them aside, a common mistake in mainstream economics (DF). Indeed, we can be well-off and still not 'function' well. Affluence, if it is to be of any value at all, ought to be converted into good or productive actions that can buttress our own self, such as food into eating, or books into reading, or acquaintances into good company. Yet, such conversion is not enough.

In order to 'be well', our supposedly well-off status, apart from being converted into productive functionings for our existence (food into eating), needs also to find the way of being translated into a state with which we can reassure –and enhance– our capacity to achieve those

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<sup>198</sup> See, for example, the list of authors mentioned in Chapter 5.

things we consider good for our life. The act of reading does not necessarily transform me into a truly literate person; nor the function of eating necessarily give me the state of being well-nourished. Recent research has found that people in the US, with easy access to food, are ill-nourished due to unhealthy food, or are in an unhealthy state due to their overeating (Berg 2005). Similarly, a nation can have a sustained positive rate of GDP during a specific time (affluence), yet continue being a poor country, because their inhabitants are still unable to improve their standards of living, thus are unable to 'function' well. In such cases, Sen would argue, those countries have been incompetent in translating their increasing commodities into a better quality of life for their population.<sup>199</sup>

A second clarification about Sen's functionings is the need to recall Aristotle's contribution to this concept. Following the Aristotelian notion of potential and realised beings, functionings can also be potential or realised, the former being the possibility to achieve something, the latter reflecting the actual achievement (Daka 2008:73). Far from being a mere theoretical distinction, this does matter when assessing wellbeing. For instance, a person may have the possibility to eat but may choose not to do so because she wants to fast due to her religious values, which is significantly different from the person who is forced to starve. The one who freely decides to fast does not lack eating functionings, as she has them potentially. Conversely, a girl who suffers starvation in a Latin-American slum because her parents cannot provide her with food, has no eating functionings, neither potential nor actualised. Analogies can be applied to the public arena. As Sen has proved (1981), famines throughout history were not caused exclusively by lack of food. In some cases, although the potential functionings of the country were intact (food and other commodities were in fact available), due to bad policies, such functionings could not be actualised.<sup>200</sup> Different is the case of other countries which, due to natural disasters, have no potential functionings concerning food and basic health, as was the case of Haiti in the aftermath of Hurricane Thomas in November 2010. In these cases, aside from charitable immediate assistance, international financial aid and policies will certainly vary according to the potential functionings a country has to deal with similar tragedies.<sup>201</sup>

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<sup>199</sup> See the examples and tables of Chapters 5.3/5.4.

<sup>200</sup> See the Figure II-2.2. on the Bangladesh famine in 1974.

<sup>201</sup> For instance, one of CAFOD's projects in Sri Lanka which was designed after the tsunami of 2004, was about granting housing and basic food to the beneficiaries, who at the time were definitively lacking functionings, either potential or actual. Contrastingly, CAFOD's recent projects on organic farming are more focused on training the beneficiaries so as to help them actualise their potential functionings as farmers and stewardships of the environment, as well as to transform their functionings of eating well into living well (this is a personal observation of a trip to Sri Lanka to visit those projects in January 2014).

Following the Aristotelian model, functionings can also be grouped into elementary and complementary functionings. The former are grounded in those basic concrete and highly valuable “means” without which almost nothing else is possible to achieve, such as being adequately nourished or healthy. Gustavo’s disabled daughter,<sup>202</sup> who lives in Lima, Peru, would not be able to deploy her elementary functionings of eating and being safe in relation to other people, if it were not for the financial assistance that Gustavo and his partner Araceli send her every month from a slum Argentina. Complementary functionings, conversely, are those realised achievements that, more than just ‘a means’, are considered a value in themselves, such as being respected by others in the society, or achieving a reasonable amount of self-respect, or being able to participate in public affairs in the community. Araceli, for example, had had serious problems in the past with partners who did not respect her dignity. Gustavo’s different attitude towards her, alongside her participation in the Parish Council, have permitted her to recover her self-respect as a woman. Although a value in itself, such functioning has, in turn, boosted her capacity to encourage new projects in the neighbourhood. If a wellbeing assessment aims at going beyond the basic needs approach, these later functionings are pivotal. Although more “end-focused”, these functionings enable a person to generate more functionings and equip herself with a substantive quality of freedom (Daka 2008:73), hence with what Sen calls ‘capability’.

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<sup>202</sup> Gustavo and his partner, Araceli, are the characters of our example of poor people living in a slum in Latin America (see the Introduction to Part I and Part II).

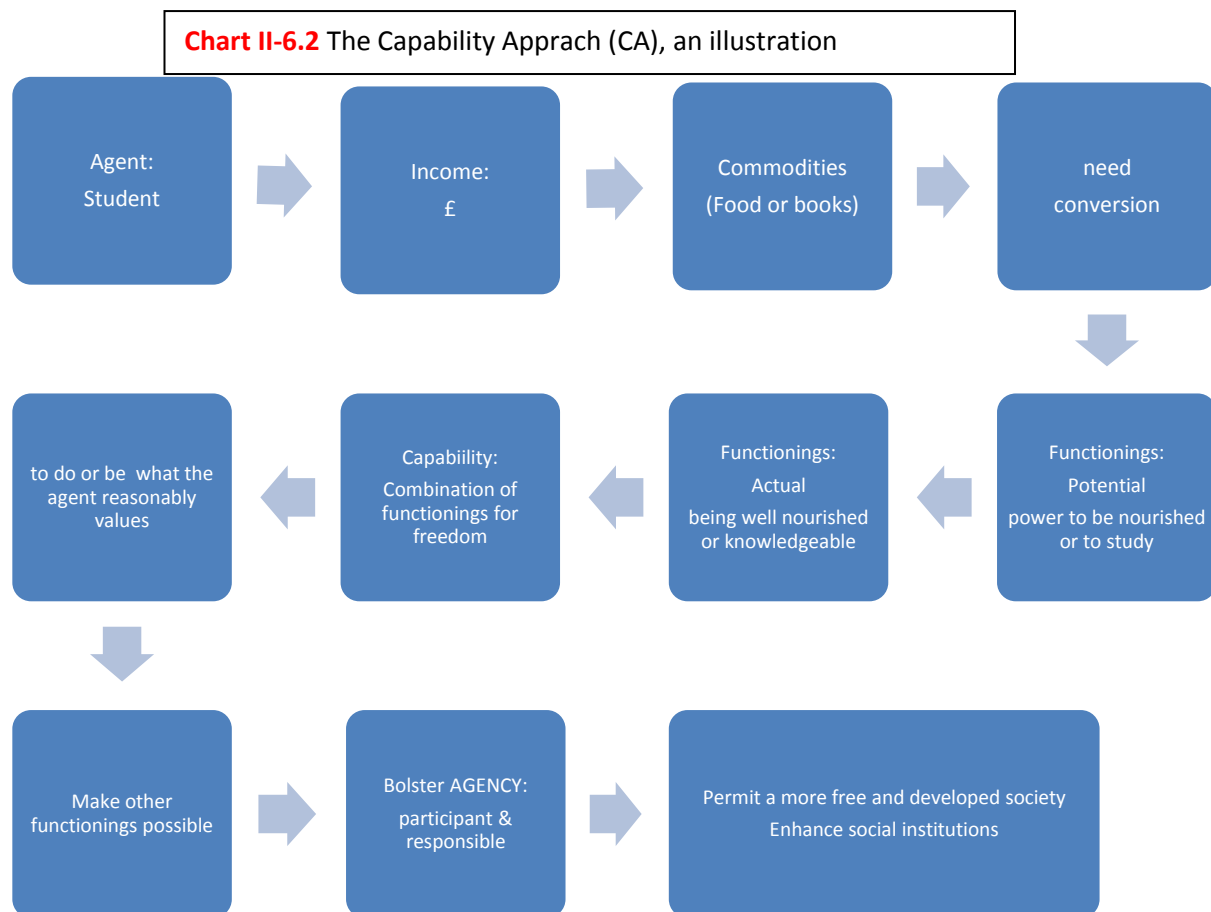


Chart II-6.2 above illustrates explanations on functionings, although limited to elementary functionings. Let us suppose that this student is Gustavo, who attended his primary school in Peru. Because his parents used their low income to buy him nutritious food, he was able to translate his potential functionings to be nourished into actual functionings of being well-nourished. Also, because he enjoyed his education, and therefore read the books his parents and the school provided –among other things–, he was able to translate his potential functionings to study into actual functionings of being knowledgeable. This combination of functionings has given Gustavo the ‘capability’ to become an electrician, a job most of his friends in Peru could not even dream about, and a job Gustavo has highly valued since a child. The reason for valuing this business is twofold. One of his father’s best friends was an electrician, who happened also to be an excellent example as parent and husband. Secondly, a job as an electrician in poor neighbourhoods in Peru thirty years ago was not available to everyone, and it was seen a sign of development and opportunity. Hence, Gustavo’s aspirations to progress as a person and as a member of a society have been related to electricity. It is fair to assert that Gustavo’s reasons to value working in an electrical business can easily be accepted by contemporary members of his society.

After a long period of working in jobs he did not want, Gustavo, thanks to Araceli's support, got a job as an electrician, enhancing his 'agency'. This has triggered in him more functionings, such as being able to feed his family in Argentina and in Peru, or help slum youngsters addicted to drugs. New functionings have permitted him to bolster his participation and responsibility in society. His participation has enriched some institutions, such as his family or the Parish Council and those fighting against addiction, or the Electricians Trade Union of which Gustavo is an active member. This fairly simple example shows the process of development based on capabilities or freedoms. But the term capability needs further elaboration.

### 6.3. Capability

The common understanding of 'capability', as explained before, is associated with the capacity or ability to do something. For Sen, however, this term is a more complex one, a technical word with which he tries to synthesise the idea of freedom and its impact on people's wellbeing. Capability, therefore, is conceived as 'the substantive freedom to achieve alternative functioning combinations (or, less formally put, the freedom to achieve various lifestyles)' (Sen 1985b:30; DF:75). In other words, a person can only function and be well, not merely if she has her basic needs covered (e.g. being well nourished), but also if she is entitled to access things or services she values as pivotal to her flourishing (e.g. a writer to a library and books, a citizen to freedom of speech and to the possibility to participate directly or indirectly in public decisions, a professional athlete to a venue where s/he can train, etc.).

Those values or objectives need to have two essential characteristics. First, they need to be freely evaluated, neither imposed (violation of negative freedom) nor selected due to lack of choices (denial of positive freedom). Second, a person's free aims need to be reasonable. The adjective 'reasonable' is important in Sen's language. It implies that a set of functionings to achieve those objectives need to be within the person's reach (Deneulin 2014b). It would be unreasonable to aim at living in the 19<sup>th</sup> century, for example. Moreover, 'reasonable' objectives that can improve an individual's wellbeing need to be ideated with and through his reason. Sentiments, impulses, desires may count, but they need to be articulated through reason. But what if, for example, my reason for earning millions of pounds were to be able to offer a good life to my family and to influence society for the benefit of the most vulnerable?<sup>203</sup> Personal reason, for the CA, is always subject to social confrontation or public contestation. Individual reason is

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<sup>203</sup> For a criticism on this idea of having 'reasons to desire or to value', see Sudgen (2006).

inextricably related to public reasoning,<sup>204</sup> because our reasons to hold certain values or life-styles are constantly subject to critical examination by other members of the public (TIJ).<sup>205</sup> Therefore, having ‘reasons’ to do certain things or to have a given life, cannot be equated with doing whatever comes to one’s mind, or living just as one likes, regardless of the ‘others’ (and their reasons) who happen to live alongside me.

In short, a person has capability when she has a ‘set of vectors or functionings’, an ‘alternative combination of things [she] is able to do or be’ (DF:75) freely and reasonably. When evaluative theories and measures of individual advantage omit this combined set of functionings (capabilities), either because they simply ignore them or because they presuppose unanimity regarding some specific set of objectives (e.g. primary goods or good institutions), they fail in evaluating people’s wellbeing. Conversely, the CA is well equipped to judge individual advantage or deprivation at any level, either in poor or in rich countries or in any social condition, because it is concerned with foundational issues of the individual, hence of his context, especially with the positive dimension of freedom (Daka 2008:75).

### 6.3.1. Capability and freedom

One reason why ‘capabilities’ are so important to measure and promote development is their intimate connection with ‘freedom’. Indeed, freedom and capability are as linked as basic building blocks (Sen 1999), and are occasionally used in the literature as synonyms (Deneulin 2014). This connection is fairly relevant for our research, because the notion of freedom as capability -with which a person can achieve wellbeing-, can be matched with the notion of freedom as a gift from God -with which people are able to flourish.<sup>206</sup> This section will not discuss the theological notion of freedom, but it will rather address in depth the notion of freedom that lies behind the CA.

Perhaps the best way to start explaining freedom according to Sen, is to go back to Araceli and Gustavo. Quite often, as any couple, they discuss the best way of earning money. A common discussion is on how much money they should send to Gustavo’s daughter in Peru, a sum constantly under review due to their meagre income. Sen argues that these kinds of discussions are as ancient as human beings, and he recalls an old Sanskrit poem in which

<sup>204</sup> In Sen’s view, public reason transcends the ordinary ways of holding public discussions through democratic representatives and includes other expressions of social dialogue and representation. See Chapter 7 and Part III.

<sup>205</sup> This topic will be further expanded in 6.4, 7.1, and 10.3.

<sup>206</sup> See Chapters 10-12, where we based the CST-CA dialogue on parables of the New-Testament which, although have a significant economic content, emphasise the fundamental anthropological attitude of ‘the gift’. The gift, it will be argued, enhances people’s freedom.

Maitreyee and her husband Yajnavalkya ask each other about how to become more wealthy (DF:13-14).<sup>207</sup> Just like Araceli and Gustavo, the Indian couple question not just the 'how' (and how much), but also the 'what for'. But it is in the question about the purpose where the couples differ, because Maitreyee's goes quite deep: "should wealth give me immortality?",<sup>208</sup> she queries. "No", her husband replies, "it would just make your life like the life of the rich". "Ah", the woman concludes, "then what should I do with that by which I do not become immortal?". For Sen, this is not just a philosophical question about the limitations of the material world, but it is also an economic question about the nature of wealth and development. Affluence should help people to live better lives, to increase their wellbeing. A crucial spur to generating wealth is to live according to one's idea of the best possible way of living, which means also to boost our freedom. Affluence would be meaningless if it forced one to live against one's will. No person or country wants to increase their income for the purpose of being enslaved, neither to lose their freedom. The fundamental question, therefore, is about the nature of freedom.

Sen argues that 'a good society... is also a society of freedom' (Sen 1992:41), which means that the promotion of wellbeing necessarily requires the advancement of freedom. Those development projects which do not include human freedom as a core value, lack being comprehensively human. But freedom is not an easy concept, since, as Sen acknowledges, it is multi-layered: it is psychological and physical, individual and social, subjective and objective, positive and negative, instrumental (as a means for something else) and substantial (Daka 1998:93). Yet, the CA does not intend to address freedom fully, but rather focuses on those dimensions of freedom which are crucial for socio-economic development.<sup>209</sup>

Development is generally approached in two contrasting ways. One way considers development as a "fierce" process, graphically characterised by Sen as 'blood, sweat and tears' (DF:35).<sup>210</sup> It neglects any "soft-headed" approach which considers, in the first place, any kind of social safety nets to protect the very poor, or an increase in public expenses so as to provide social services to the population at large, or an overemphasis on human rights or environmental

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<sup>207</sup> See Chapter 5.1.2

<sup>208</sup> This is a paraphrasing of the original texts quoted by Sen.

<sup>209</sup> See Part III, especially Chapters 10-11, where we argue that a combination of CA and CST can enrich both approaches regarding development/freedom.

<sup>210</sup> This idea was introduced in 1983, in an essay titled: 'Development: Which way now?', expanded in 1988(b) with 'The Concept of Development', and summarised in the second chapter of *Development as Freedom* (35-36) and further developed in 1997 with 'Development Thinking at the Beginning of the 21<sup>st</sup> Century'. Sen takes the idea from the words of W. Churchill, when trying to convince the population of Great Britain to accept tough measures related to the Second World War. Despite the advancement in society compared to Churchill's time, this tough narrative of development is still held by leaders of different countries, even the so-called 'developed' ones. For example, see G. Osborne's (2013) speech for the UK budget 2013.



concerns. Those things, for this “fierce” approach, are merely luxuries in the tough and austere process of development, and could be supported later, once a country is already developed. Sen points out that there are different economic and political theories embracing this approach, from socialists to liberals and from West to East. They may only disagree on the particular ‘areas of softness’ which, for them, need to be avoided.

For example, for liberal market idealists -from Hong Kong to London, from Singapore to New York, from Monaco to The Cayman Islands-, a ‘soft’ area of development, i.e. an area that can only be addressed once the country is already developed (if ever), is the unregulated financial system. Because free financing is supposedly meant to boost the economy, early regulation on financial operations would prevent that from happening, restraining the development process. Other examples of the notion of ‘soft’ areas of development normally come to light in the national budget debates. For instance, for the Conservative Party in the UK, public social expenditure needs to be regulated according to the National income (GDP). Thus, in times of austerity, and in order to promote socio-economic development, such social expenditure (e.g. public or educational health services) must be seriously restricted.<sup>211</sup> Time will eventually come when the country, once financially in order, can allocate more money to the public health system. Similarly, development programmes in poor countries are often limited by public policies whose priority is to increase the national income and reduce national expenditure so as to, supposedly, stimulate economic growth. Historically, in countries under these circumstances, among the first spending-cuts, health and education occupy a privileged position. But perhaps the most illustrative example of the idea that some areas of development are ‘softer’ than others is the environmental case. For communist China, neo-capitalist Russia and some developing countries in Latin America –both liberal and socialist-,<sup>212</sup> environmental issues, albeit important, should only be considered after economic development takes off. For this approach, environmental defenders should be protesting only in rich countries, and leave poor nations to ideate feasible processes of development, even if they are not environmentally friendly.<sup>213</sup>

In contrast, Sen argues, another way of understanding development is as a ‘friendly’ process, a parallel effort in seeking economic efficiency, social development, environmental care and

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<sup>211</sup> See Conservative Draft Manifesto 2010.

<sup>212</sup> See for example the case of polluting mining in liberal Peru (see IFHR 2013 and Valencia 2012/2012b); or the remarkable case of oil exploitation –and contamination- in the Amazonian Yasuni National Park in socialist Ecuador (see UNDP 2010, UNDP 2013e, BBC 2013).

<sup>213</sup> CST has strongly avowed its opposition to this understanding of development, as will be further explained in Part III. Pope Benedict XVI has argued that it is a grave mistake to consider material economic growth as the sole priority when planning development (*Caritas in Veritate*, 21-33), because human development comprises dimensions such as politics, culture and religion, morality and societal organisation, technology and sciences, etc.

political liberties (DF:36). The CA is, not surprisingly, more compatible with this theory of development than with the 'tough' one, because it sees development as 'a process of expanding the real freedoms that people enjoy', not merely as increasing material wealth (ibid.).<sup>214</sup> With regard to the environmental case, Sen (1995b) claims that considering economic development and environmental care as unavoidable antagonistic values is a mistake. This misinterpretation of development derives from a narrow notion of seeing it exclusively in terms of material growth. A wider view of development would acknowledge not merely the eventual conflicts between growth and the environment, but more importantly, the compatibility between both. Indeed, the environmental analysis is, for Sen, an inescapable part of the battle against poverty. This is not just because the impact of resource depletion and climate change will fall disproportionately on the poor, but also because environmental degradation will weaken the very source of economic growth. If biodiversity is ruined, development would be seriously compromised, not merely because people would struggle to get the necessary 'needs' they require to live, as described by the Brundtland Report (UN, 1987), but also because freedoms people have in order to follow a life worth valuing would be highly limited. But which freedoms should development programmes protect or promote?

### 6.3.2. Different freedoms

According to Sen, freedom is not merely the capacity to act without external oppression - negative freedom- (e.g. freedom from basic poverty, from an oppressive domestic, religious or political regime, freedom from disease, etc.), but also the ability to seek those valuable things in life -positive freedom- (e.g. the freedom of Gustavo to become a good electrician, or the freedom of Araceli to become a respected member of the Parish Council).

Aside from the distinction between positive and negative freedom, Sen also distinguishes four roles of freedom: (i) instrumental; (ii) constructive; (iii) constitutive; and (iv) substantive (DF and Daka 2008).

The *instrumental role of freedom* is concerned with 'the way different kinds of rights, opportunities, and entitlements contribute to the expansion of human freedom in general, and thus to promoting development' (DF:37). These can be classified into:<sup>215</sup> (a) *political freedoms*: civil rights, freedom of press or expression, freedom of political participation (DF:38); (b) *economic facilities*: opportunities to utilise resources for consumption, production or exchange (DF, 39); (c) *social opportunities*: individual freedom cannot be understood without its social

<sup>214</sup> For Sen, this is both the 'primary end' of development and its 'principal means'. Freedoms linked with the 'end' are called constitutive, whereas freedoms closer to the means are called instrumental (DF:36).

<sup>215</sup> For a further explanation on this classification, see Daka 2008:92-99.

context, because it 'is quintessentially a social product' (DF, 39); (d) *transparency guarantees*: about trust and openness in dealing with each other. These are particularly important so as to prevent corruption, financial irresponsibility and obscure dealings (DF, 39);<sup>216</sup> (e) *protective security*: necessary safety nets created to avoid misery and starvation, such as unemployment benefits (DF, 40).

These instrumental freedoms shall not be considered in isolation, but rather as a group, all interconnected. Indeed, 'the effectiveness of freedom as an instrument lies in the fact that different kinds of freedom interrelate with one another, and freedom of one type may greatly help in advancing freedom of other types' (DF:37). While economic growth can help increase private incomes and facilitate public investment in areas such as financial security or social promotion, the enhancement of social opportunities (e.g. basic education) can also promote economic growth. Sen quotes the example of Japan, whose economic prosperity during the Meiji era (1869-1911) was mainly due to the expansion of public education and health care (ibid.:41).<sup>217</sup> Likewise, Argentina was also able to become the fifth wealthiest country in the world during 1940s, not merely because of economic revenues, but also due to the education reform that started in the 1880s and led the nation to occupy the first place in Latin America regarding literacy indicators (see Lyach *et al* 2011). Both Japan and Argentina's examples<sup>218</sup> prove that a "soft" dimension of development (i.e. its human dimension, such as education and health care for all) are not a kind of 'luxury' for already rich countries, a common tendency in economic and political circles, but rather a necessity for the process of actual human advancement (DF:41).

The *constructive role of freedom* helps us identify the conceptualisation of needs, including the economic ones, in a given social context (DF:148). Its importance relies on the fact that it provides information about our choices, values and priorities, crucial to assessing actual economic activity and individual wellbeing (Daka 2008:95). People have reasons to pursue economic needs that go beyond mere maximisation of profits or savings.<sup>219</sup> Therefore, taking on board this constructive role of freedom widens the idea of freedom and development of

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<sup>216</sup> The lack of these freedoms has proved to be devastating. The 2008 financial crisis is clear evidence of how the lack of transparency in financial operations can drag both developed and developing economic systems to collapse (Shiller 2012).

<sup>217</sup> We trace Sen's admiration to the post-WWII Japanese model to Tagore's influence (see Chapter 5.1.1).

<sup>218</sup> For more detailed economic examples and explanations, such as the contrast between India and China's models of economic development, or the impact of the mortality reduction in 20th century Britain, or the relative costs of low incomes and public provisioning, see DF:41-53.

<sup>219</sup> See Chapters 4.2.1 and 4.2.2.

mainstream economics, offering to liberal economists a better understanding of what persons do with their choices and liberty.<sup>220</sup>

The *constitutive role of freedom* is, for Sen, the primary end of development (DF:39). This role identifies and enjoys those constitutive elements of our existence that permit us to survive, commonly known as ‘basic capabilities’ (Daka 2008:95). Unlike Nussbaum, Sen does not set a list of basic capabilities because, he argues, this list may vary from person to person and from culture to culture.<sup>221</sup> However, the consideration of constitutive freedom always helps to identify, in each situation, which capabilities are crucial for our physical survival.

*Substantive freedom* combines the instrumental, the constructive and the constitutive role of freedom. This is the one Sen identifies with capabilities. It tells us more about the quality of a person’s life and about how and what she existentially and practically values. The distinction of this role is to address liberty beyond any ‘instrumentality’, focusing therefore more on the agent himself rather than on the means to achieve freedom; more on the ability of a person to be a doer, i.e. on his ‘agency’, rather than on his competence to maximise benefits and minimise losses.

The CA offers to policy makers<sup>222</sup> these subtle distinctions of freedom so as to promote human development more effectively. Indeed, according to Sen, policies should aim at removing the major sources of un-freedom: ‘poverty as well as tyranny, poor economic opportunities as well as systematic social deprivations, neglect of public facilities as well as intolerance or over-activity of repressive states’ (DF:3). Such objectives, however, will never be achieved without a wider understanding of freedom than the one prevailing in present liberal and welfare economics. In effect, ‘the discipline of economics has tended to move away from focusing on the value of freedom to that of utilities, incomes and wealth’. By so doing, liberal economics, paradoxically, has narrowed the notion of freedom, hence underappreciating the role of the basis of the free market mechanism. The CA intends to redress the narrowed approach to freedom, proposing thus a more comprehensive vision of development (DF:27).

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<sup>220</sup> We will further this argument in Part III, Chapter 11, when developing the relation between freedom and gratuitousness.

<sup>221</sup> For an explanation on the distinction between Sen and Nussbaum’s capabilities, see Gasper (1997). For their differences on wellbeing and agency, see Nussbaum (2011:197-201).

<sup>222</sup> Chapters 8-12 argue that Sen’s comprehensive explanation of freedom, linked with CST, can enrich development policies, particularly in countries with Catholic population.

### 6.3.3. Freedom: process & opportunities

In order to widen the notion of freedom of mainstream liberal economics, the CA has not only propounded distinguishing between different kinds of freedoms (positive or negative) and diverse roles of liberty (instrumental, constructive, constitutive and substantive), but has also advanced the distinction between the *process* that allows people to think, act and be free, from the *opportunity* that people have, in their own particular circumstances, to decide, act and live freely. Sen argues that ‘unfreedom can arise either through inadequate processes (such as violation of voting privileges or other political or civil rights) or through inadequate opportunities’, such as ‘the capability to escape premature mortality or preventable morbidity or involuntary starvation’ (DF:17). This last distinction is essential so as to avoid two common mistakes in economics. The first one is to confine attention only to appropriate procedures, without taking into account if some people, despite such procedures, suffer from systematic deprivation or lack substantive opportunities. This mistake can be easily found in libertarian policies when applying welfarist measures. The second mistake is to focus merely on adequate opportunities, disregarding the nature of the procedures that actually bring opportunities to people and bolster their freedom of choice. This is a common error of some so-called socialist policies,<sup>223</sup> such as those in current Venezuela. Despite the fact that the administration of Hugo Chavez, for the first time in the history of the country, has fostered the empowerment of the marginalised, thus widening their set of opportunities, it has often deployed procedures that hinder actual freedom, as has been denounced by human rights organisations.<sup>224</sup>

Within the CA, it is important not to identify capability-freedom with choice-freedom. As Deneulin (2013) explains, from an individual perspective, consumers’ choices do not necessarily increase people’s wellbeing. Having choices always helps, particularly in order to find the most effective and economic product. However, an excess of choice may force providers to reduce the quality of their products so as to compete in the market, impinging the consumer’s choice. From a social perspective, expanding choices for different private health care providers, for example, does not necessarily improve people’s health and their wellbeing. On the contrary, it can be more costly for some people, especially for the most vulnerable, as depicted by the US health care system in contrast with the UK National Health Service.<sup>225</sup>

<sup>223</sup> Although Sen refers to ‘so-called consequentialists’ (DF:17), we have opted to refer to socialist policies, which contrasted more with the libertarian ones, and which are easier to illustrate the error to the reader.

<sup>224</sup> See Human Rights Watch website, particularly an article on Chavez’s authoritarian legacy regarding social procedures: Available from <http://www.hrw.org/news/2013/03/05/venezuela-chavez-s-authoritarian-legacy> Accessed on 6/3/2013

<sup>225</sup> See *The Independent* article ‘NHS pushes UK’s healthcare to top of the league table out of 11 western countries, with US coming last’, 17/6/2014.

These examples attest that the CA cannot be taken up by libertarian maximisers of choices promoting an absolute free market. This is not due to an ideology that belittles liberty and thus needs to be disregarded by libertarians, but precisely because a comprehensive focus on human liberty, such as the CA has, proves that some libertarian proposals, paradoxically, do not always actually bestow freedom on people. The question when facing problems of choices or opportunities, for Sen, resides on the choice a person has in order to function well, according to reason, so as to live well according to one's own values. This shows the important role that the individual agent (agency) plays in the CA, as will be discussed in the next point.

To sum up, freedom is neither restricted to its negative form (e.g. freedom from basic poverty, from an oppressive domestic, religious or political regime, from disease, etc.), nor to its instrumental form, as a means to achieve something else. The freedom that comprises the CA considers, but goes beyond, basic needs -so as to function well- or beyond certain entitlements over assets or commodities -which might allow a person to develop her personality (Daka 2008:79). Freedom in itself, not merely as an instrument, is crucial for a person to live a substantive qualitative life. This idea of freedom, including its *process* and *opportunity* aspects, is pivotal for development policies aiming at reducing any kind of 'un-freedom' that hinders human progress. It is this freedom, too, that permits a more accurate evaluation of deprivation or inequality, because it allows us to assess diversity in a more holistic humane way than other approaches, such as those limited to one set of human objectives (e.g. basic needs, basic entitlements, access to material wealth, effective institutions, or even choices). Although those elements are necessary to measure wellbeing, they do not tell us, as such, if individuals are functioning well and living a life they reasonably think is worth living. Moreover, when economic and development policies intend to redress inequality, what matters, according to Sen, is the lack of equality in *functionings* and *capabilities* to access to a reasonably good life, rather than the equality of incomes, utilities, or choices.<sup>226</sup>

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<sup>226</sup> Figure II-5.2.4 shows how often Sen's work has been focused on 'inequality'. For Sen (1983:11), a narrow materialistic view in economics has fomented the idea of the 'trickle-down' effect, with terrible social consequences due to current and unprecedented levels of inequality in the world, as Pope Francis has recently pointed out (2013). In contrast, Sen's CA is focussed on the expansion of human capabilities, permitting issues of inequalities to be addressed from the starting-point of the development process. Far from being merely an appendix to the processes, inequality problems are intrinsic elements of them. Indeed, the unequal outcomes deriving from development processes are not just related to the differences in accumulation of commodities, but are also related to what people value for a good life and, hence, to justice (Sen 1983:21; 1999:92-94). We will further this issue in Chapter 12.

## 6.4. Agency

After explaining the two pillars of the building-language of the CA, i.e. functionings and capability, we need to analyse the main platforms of such building, namely ‘agency’ and ‘well-being’.

The person is the subject, author, means and end of the CA (Daka 2008:84). While evaluating well-being, different values a person or agent has need to be considered. Indeed, Sen defines agency as the ‘pursuit of whatever goals or values he or she regards as important’ (1985b:204). However, when these values are limited to material utility -as if human beings were actuated only by the maximisation of economic benefits-, the ‘being’ and ‘doing’ (agency) of people is totally misconceived (DF). For this reason, Sen has worked to expand the traditional idea of economic agency. Firstly, he clarifies Adam Smith’s understanding of it, usually misunderstood by economists and academics. He then applies the anthropological Kantian notion of the individual as valuable in himself, and the Rawlsian explanation of responsible agency. Finally, Sen goes beyond ‘the agent’ of economic game theory, limited either to act for the maximisation of his own benefits or on behalf somebody else’s goals.

### 6.4.1. Adam Smith’s economic agent: a clarification

According to Sen, ‘it is the narrowing of the broad Smithian view of human beings, in modern economies, that can be seen as one of the major deficiencies in contemporary economic theory’ (EE:28). This misunderstanding is commonly based on the well-known phrase in *The Wealth of Nations*: ‘it is not from the benevolence of the butcher, the brewer, or the baker that we expect our dinner, but from their regard to their own interest’ (1776: 26-27). The phrase, as Sen points out, cannot be read outside its context, where Smith is explaining the nature of market transactions and of the division of labour (EE:23). With this phrase, Smith is by no means advocating self-interest as the unique motivation of human behaviour –including the economic one-, nor is he deprecating human benevolence or social interests (EE:28).<sup>227</sup>

Sen argues that Smith was inimical to accepting that only ‘one’ virtue, such as prudence, can govern the conduct of every individual (EE:22). As a thinker with solid Stoic roots, Smith recognised the significant role of prudence for the achievement of self-command (control), but also argued that prudence has the quality of reason and understanding. Thus, prudence, as such, cannot be taken as a commanding behavioural pattern, because we cannot even assert which of its two distinctive roles is the prevailing one in a given scenario. Besides, however important

<sup>227</sup> Sen is not alone in this interpretation of Adam Smith. Other scholars argue that, for Smith, as for most of the 18th century discourse, self-interest can never be equated to selfishness (Cima and Schubeck 2001).

prudence can be, there are other virtues needed to achieve good social behaviour, such as ‘sympathy’, or the qualities of ‘humanity, justice, generosity and public spirit’ so as to help others (Smith 1790:189), or even the act of sacrificing one’s own interest for the sake of the greater community from which individuals are neither separated nor detached (ibid.:140).

Likewise, although Smith saw that many actions, particularly in the market, are driven by self-interest, this does not mean that such interest governs the conduct of every individual in all economic transactions, nor that other motivations are not needed so as to achieve the ideally mutual advantage of the agents involved (e.g. benevolence).<sup>228</sup> Besides, as occurs with prudence, self-interest also has different dimensions, and should therefore not be restricted to one, such as selfishness or solely the maximisation of interests. For example, the agent’s own (or self) interest also reflects self-love, which, for Smith, is crucial in any healthy relationship. Therefore, when agents, in the market, are focused on the advantages for each other, rather than on their necessities, they are actually respecting the self-love each person has (or should have) when *offering* their products or services, or when *demanding* products or services from other people for the betterment of their own businesses. In precarious markets in India or the Middle-East, for example, to be uninterested in bargaining the price of a product is considered a serious offence to the seller. In this case, it is not the ‘need’ of the buyer or the seller that matters most, but their self-interest expressed in a particular commercial transaction.<sup>229</sup> Adam Smith was trying to expound on this issue when he referred to the famous ‘butcher example’.

Furthermore, for Sen, self-interest is championed by Smith only in specific situations, particularly related ‘to various contemporary bureaucratic barriers and other restrictions to economic transactions which made trade difficult and hampered production’ (EE:25), but it is never proposed as the paradigm of economic rationale.<sup>230</sup> Any further interpretation, such as considering self-interest as in opposition to social interest, or to exclude benevolence or other virtues from economics, are not Smithean orthodoxy, but rather cheap libertarianism.

Smithean self-interest is actually a starting point to promote a market that can produce greater good for the multiple agents involved in the supply-demand free bargaining, including those along the supply chain at any level (e.g. farmers who supply the wheat for the bread, the transporters, etc.). In economic transactions, as occurs in any kind of relationship, an initial –and

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<sup>228</sup> Although Smith does question that benevolence is indeed a weak rationale to sustain market transactions on its own, he does not exclude it from the economic equation altogether (EE:23-4). See Chapter 11.

<sup>229</sup> I had this experience in India, where the seller of a shirt was annoyed that I did not want to bargain.

<sup>230</sup> Sen develops the link between self-interest and self-love set up by Smith when addressing social commitment (see TIJ:188-190).



perhaps prevailing- point or focus needs to be identified. We have to start from somewhere, and then discover further reasons why people trade with each other (e.g. benevolence, or –we argue- gratuitousness).<sup>231</sup>

Ironically, this notion of self-interest linked with love and complemented by further virtues, is not usually remembered by libertarians quoting Adam Smith's principle of free-market. By contrast, a careful examination of Adam Smith's arguments permits Sen to assert that an agent, in liberal economics, can never be restricted to a mere maximiser of selfish benefits (a 'rational fool'<sup>232</sup>), and that other values too are needed for healthy economic operations.

#### 6.4.2. Kant and Rawls's influence: the agent as an end in him/herself; responsible agent

To further scrutinise the notion of economic maximiser, Sen not only clarifies Adam Smith's misinterpretation of self-interest, but also brings on board Kant's idea that a person is an end in herself (never a means to something else), and Rawls's notion of persons as 'beings' with concerns, desires, needs and interests, to whom justice as fairness must apply (Daka 2008:84). Moreover, unlike the idea of 'agent' of the economic game theory, where the agent is someone acting only on somebody else's behalf, Sen's idea of agency is to improve the individuals' capacity to act on their own behalf whilst bringing about change (DF:19).

Thus, an agent, according to Sen, differs from a motionless patient; is someone able to form goals, commitments and values on his own, and 'whose achievements can be judged in terms of his own values and objectives, whether or not we assess them in terms of some external criteria as well' (DF:19). Furthermore, an agent is never a mere statistic, but rather an actual member of the public, a participant in economic and socio-political actions. This may vary, from participating in any sort of market, to being indirectly or directly involved in politics or similar spheres (Daka 2008:85). Consequently, within economic-development evaluations, an agent needs to be acknowledged not just as a subject that can be well or ill (well-being), but also as a 'responsible person' who acts or refuses to act or respond to the realities she is facing, who can choose to act or respond in one way or another (freedom).

For instance, a person can choose to respond (or not) to the shouts of a neighbour who is being abused, by calling the police or by refraining to intervene in any way. A famous real-life case is often quoted by Sen as an example. It occurred in Queens, New York, in 1964. 'A woman, called Catherine (Kitty) Genovese, was repeatedly and then fatally assaulted in full view of others

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<sup>231</sup> See Chapters 11-12.

<sup>232</sup> See Sen 1977b.

watching the event from their apartments, but her cries for assistance were ignored by the observers' (TIJ:374). Only one spectator reacted positively by shouting to the assailant that he should let the girl alone, although he did not provide any further assistance, nor call the police. Sen argues that three inter-related distortions of agency happened: (i) the woman's negative freedom (not to be assaulted) was violated; (ii) the attacker's positive freedom (to live without attacking the life of others) was violated; and (ii) the by-standers' duty to provide reasonable help to a person facing assault and murder was also violated, because as agents, they should somehow have responded to the situation (ibid.). If they did not respond for fear of risking their lives and that of their families, then their agency and capability were seriously limited before the event took place. But even if we consider the omission as 'reasonable' because they were deliberately trying to protect their own lives, there are other reasons that will weaken their case. Indeed, they did not need to actually put their lives at risk by personally intervening. They could have called others, or better, the police, to assist the woman in need. The absence of any of these alternatives cannot but be understood as a lack of responsibility, the attitude of a motionless patient rather than as an active agent.<sup>233</sup>

In short, for Sen, the wellbeing of an agent comprises different aspects. One is to be respected by others and by the State as an end in him/herself. When economic policies, political manifestos or business plans address agents as mere commodities, an alarm should be raised. Another aspect of any agent is his social responsibility to act or produce change, a significant contribution when applying it to economic-development policies, even to NGOs and different charity projects. These two aspects echo what CST has been preaching about workers, human rights holders and pensioners, etc.,<sup>234</sup> and resembles CST idea that rights are always intrinsically connected with duties.<sup>235</sup>

#### 6.4.3. Agency and wellbeing

We can see why, for Sen, agency and wellbeing are inextricably connected and constantly interacting (Daka 2008:86). Wellbeing is about how an agent pursues 'whatever goals or values s/he regards as important' (Sen 1985b:203). Therefore, an assessment of wellbeing ought to include information on agency, on what and how a person values her social actions in order to

<sup>233</sup> In fact, as Denulin (2014) explains, Sen justifies the inclusion of agency in the informational basis of moral judgement, thus in the well-being assessment, on the grounds of recognition of responsibility (Sen 1985b:204). This topic will be further discussed in Part III, as it resonates with what CST understands as responsibility to the gifts received from God, including our responsibility to respond to our fellow humans' needs (solidarity). The global lack of this kind of response generates a globalisation of indifference (*Evangelii Gaudium*, 54), as opposed to a globalisation of solidarity (*Sollicitudo*, 39). While the former hinders wellbeing, the latter ameliorates it.

<sup>234</sup> This topic has been particularly highlighted in *Laborem Exercens* (1981), *Sollicitudo Rei Socialis* (1987) and *Centesimus Annus* (1991). For further explanation see Mannion (2007).

<sup>235</sup> See *Pacem in Terris* (1963:259-264), *Gaudium et Spes* (1965:26), *Compendium* (2004:156).

pursue her reasonable goals. In other words, wellbeing assessment comprises moral judgements of agents, justified on the grounds of recognition of responsibility, because persons are bottom line 'responsible agents' (ibid.).

However, according to Sen, it is crucial to distinguish the *wellbeing* aspect of freedom from the *agency* one (1985b<sup>236</sup>). In response to criticisms of this complex distinction,<sup>237</sup> Sen argues that, although wellbeing and agency freedom are interrelated and interdependent, they still need different treatment, because they illustrate two contrasting variables, which, if confused or ignored, could be damaging in development economics or social policies (1988:43-44). For example, when present feminist movements promote the active role of women in society (agency freedom), they cannot ignore the still prevalent and 'urgent need for rectifying inequalities that blight the wellbeing of women and subject them to unequal treatment' (DF:190). It would make no sense to fight for women's participation in public affairs in a slum in Latin America, without considering that women in those places carry the whole burden of family matters on their shoulders. Or it would be futile to pass a law for a minimum limit on women in parliament without addressing the causes that prevent women from becoming parliamentary members, or the blatant gross inequalities that women endure compared with men, in order to have access to positions of authority.

Likewise, 'any practical attempt at enhancing the wellbeing of women cannot but draw on the agency of women themselves in bringing about such a change' (ibid.). There will be scant regard to women's actual freedom, if policies aimed at enhancing their wellbeing are merely oriented to redress the relative deprivation experienced by women -a clear sign of social injustice-, without also addressing the agent dimension. Although there are excellent reasons for bringing 'deprivation to light and keeping the removal of these iniquities very firmly on the agenda' (DF:191), policies need also to go beyond the wellbeing (and welfare) aspect. Sen illustrates his argument with the case of the mortality rate of women in Asia and North Africa. There is enough evidence to assert that the disproportion of mortality rate of women, compared with men, is a result of gender bias in the distribution of health care and other necessities (Sen

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<sup>236</sup> Sen clarifies and furthers this point in DF: 190-2.

<sup>237</sup> For an excellent critique see Nussbaum (2011: 197-201). She agrees that to consider that 'agency' aspect of freedom wider than the 'wellbeing' one could be useful to correct or complement a welfare-utility-confined understanding of wellbeing. However, given that Sen's work epitomises the anti-utilitarian view in political-economy, this distinction, for Nussbaum, seems to bring more confusion than clarity. If a person enhances her wellbeing by performing actions that she values as good, whether good for her or for others, then the 'agency-freedom' is equivalent to the 'wellbeing' one. An emphasis on the distinction may suggest some utilitarian notion of wellbeing behind the argument, a reason why Sen does not use it in his later work. Due to limitations of space, we cannot enter into this discussion, and we have opted to follow Sen's approach.

1990b, 1992b, 1994, 1994b and 1995). Redressing those indexes is essential for social justice. Nonetheless, it is also true that the limited role of women as active agents in society has been detrimental to all people, regardless of their gender or age, and is considered one of the main causes of underdevelopment in poor countries (DF:191).<sup>238</sup> Therefore, while aiming at removing these iniquities suffered by women (who need assistance to overcome them: women as 'patients'), policies are also required to enhance women's 'agency (women as responsible persons acting or refusing to act, who can make changes in their own societies). When this happens, as Sen recalls, the benefits go beyond gender, as the case of Mary Wollstonecraft illustrates, whose feminist contribution was not restricted to women's freedom, but to the freedom of other groups too (TIJ:116).<sup>239</sup>

In addition, the distinction between the well-being and agency dimension of freedom serves as an antidote to the current utilitarian welfarism, particularly when assessing wellbeing merely in terms of the enhancement of happiness, measured either through mental-state or desire-satisfaction conceptions (EE, 58-65). For example, Gustavo,<sup>240</sup> who lives in a slum in greater Buenos Aires, had been unemployed for several years despite his great efforts to find a job. As an electrician, he felt happy when finally he was employed doing electrical tasks in a new multinational supermarket opened close to his neighbourhood. Due to the satisfaction that fulfils Gustavo's working desires, it can be attested that Gustavo has ameliorated his wellbeing. According to traditional 'welfarist-happiness' measures, Gustavo has objectively achieved something useful (utility) with which he can enhance his freedom and improve his quality of life.

However, according to Sen, there is another aspect that ought to be taken on board, i.e. the opportunity to choose functionings and achievements, which are not necessarily related to personal wellbeing (considered objectively upon given utilities), but rather with agency. Gustavo can choose to spend half the salary he earns at the supermarket in helping the Church with a programme to combat drug addiction in teenagers of the neighbourhood, despite neither having children with drug problems nor enough money to provide the basics for his own household.<sup>241</sup> Yet, Gustavo has a great heart and, matched with his wife's deep faith, he has developed the virtue of solidarity. Being an electrician, for him, is not the main configurative identity. Hence, he

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<sup>238</sup> The literature has identified diverse variables (e.g. literacy, independence, education, property rights, access to credit, etc.) in which the empowering role of women has contributed to improving the human development indicators of certain regions (DF:192-3).

<sup>239</sup> Wollstonecraft was highly critical of those who spoke with sympathy for the oppressed Indians under the rule of the East India Company and supported the freedom of the Americans to fight for their independence, but did not question the freedom of the African slaves living in America (TIJ:114-117).

<sup>240</sup> Gustavo and Araceli and their family have been used throughout this thesis to support some arguments.

<sup>241</sup> The capability to have a drug-free life is one of the most valued in slums in Buenos Aires (Mitchell 2012)

cannot bear seeing youngsters around him “wasted” due to drugs and criminality, and senses a responsibility to contribute to helping them. He doesn’t want to be a patient, but rather an agent (doer) in this regard. He also acknowledges that his contribution might reduce the problem, but certainly will not eliminate it; such achievement is beyond his and even the Church’s capacity. Nevertheless, this uncertainty in reaching the ultimate goal does not affect his determination to actively respond to the situation he witnesses, nor does the fact that his standard of living could be substantially improved had he not donated anything.

The previous example illustrates how wellbeing cannot be confined to personal utility, as conceived by traditional welfarism (or even by libertarianism), and gives grounds to Sen’s argument for distinguishing the wellbeing aspect of freedom from the agency dimension. While ‘wellbeing-freedom’ is freedom to achieve something in particular, a person’s agency aspect cannot be understood without taking note of his/her aims, objectives, allegiances, obligations, and –in a broad sense- the person’s conception of the good (1985b:203). And to perform activities seeking these objectives does not necessarily means that the standard of living of that agent will improve. Such is the case of our electrician, or of a person who fights for the independence of her country, or somebody who decides to fast for a good cause. However, seeking those objectives does enhance the agent freedom, being therefore pivotal for his individual development and for the society in which he lives.<sup>242</sup>

The distinction between the ‘wellbeing’ and the ‘agency’ dimension of freedom is worth exploring, not just to counter-argue welfarist approaches, as Sen avows, but also to find compelling answers to the question of what a good life really means. If an agent can contribute to the wellbeing of others by sacrificing his own standard of living, as occurs in the example of Gustavo, would this need to be measured as something worth promoting or something public policies would belittle? Can a person be better-off overall if, voluntarily, and according to some reasonable values, she decides to limit her wellbeing for the benefit of others? If this is the case, should we not discuss those reasonable values, i.e. if they are actually good or not? Can a value of this kind be considered universally good, hence worth supporting in public policies? Moreover, can these values be translated into corporate values, or is it against the profit-approach companies have? Does a society need something more than corporations working for profit only, such as cooperatives, social value companies, etc.?<sup>243</sup> Although we cannot address these questions fully, in Part III we explore how reasonable values concerning gratuitousness and

<sup>242</sup> For more about the example of Gustavo, the electrician, see 6.2.

<sup>243</sup> We argue that CST can contribute to this discussion (and to the CA notion of wellbeing-agency freedom) due to its wider notion of ‘the good’ (see Part III).

equality impact on assessing freedom-wellbeing and freedom-agency, and how CST and CA can complement each other on this particular topic. But before discussing the mutual contribution between the CA and CST, we need to briefly study a critical evaluation of the CA.

### 6.5. The CA critiques

Critiques of the CA abound. Due to limitations of space, we cannot address them all,<sup>244</sup> but will just mention what we regard as the most compelling ones, dividing them in two groups: the outsider and the insider. The ‘outsider’ group is represented by those thinkers who have not incorporated the CA as part of their own work. Charles Gore (1997), for example, argues that the CA fails in addressing what Charles Taylor (1997) calls ‘irreducible social goods’, i.e., goods that do not belong to individuals. For Gore, Sen belittles the fact that individual properties cannot be the only informational base for evaluating people’s wellbeing. Precisely because individuals have properties that belong to society or institutions, what is good for an individual will somehow depend on the social or institutional context, and also on whether such context is as a mere instrument or as an intrinsic value of human beings. Thomas Pogge (2002; 2010) argues that the CA omits a demanding criterion of social justice with which to compare equality (or inequality), and ignores the crucial role institutions play in individuals’ freedom. According to Pogge, Sen follows Rawls’s ‘anonymity condition’ of egalitarianism, preventing their theories from addressing problems of social justice and global responsibility. Similar criticism regarding the individual (or individuality) depicted in the CA, floating beyond institutions, are Michael Sandel (1998) and Peter Brown (2000). Sandel contends that we cannot discover alone that which we can discover in common, from the notion of what is better for our lives (well-being), to the finding of accurate policies to tackle poverty (justice). Lacking the social dimension of human beings -thus of freedom, limits any view of human behaviour. In short, the ‘outsiders’ criticise the CA for trying to improve individual choices and the exercise of individual freedom without proposing an actual alternative to the neo-liberal capitalist system, a system that, arguably, distorts individual freedom altogether due to extremely imbalanced trade-offs.

Among the insider group, the focus of the criticisms is not so far from the one of the outsiders. Gasper (1997, 2000) argues that the CA has a limited notion of the person and of agency because it does not explore in depth its social dimensions, but explains that this is a deliberate choice, since Sen wants to avoid specifying as essential some features which are too

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<sup>244</sup> For a good and greater explanation of the CA critiques, see Daka (2008:111-151). However, given that Daka’s analysis was written before TIJ, it lacks Sen’s thorough response to the main objections to the CA. For a philosophical dispute on the CA, see Cohen (1993 and 2011) and Walsh (2003).

culturally controversial. Daka (2008) and Deneulin (2008) argue that the CA lacks an anthropologically solid basis, although both authors consider that this is not a reason to reject the approach altogether. Indeed, as both authors assert, the CA, due to its open framework, can be complemented by other anthropological studies, such as the understanding of 'communal humanity' of southern African anthropology or even the Catholic view of human dignity.<sup>245</sup> For Daka, although Sen does not follow Rawls's ambiguous egalitarian liberalism, referred to by Thomas Nagel (1991) as arguably individualistic, self-interested, and situated outside the community, the influence of Rawls's liberalism on Sen's ideas still prevents him 'from proposing and achieving a robust conception of the person and community' (Daka 2008:113), belittling the crucial understanding of 'the process of othering', through which people tend to exclude, dominate or exploit others who are in a disadvantaged position in a given political-economic system (Levinas 1987, Dussel 1999). For Deneulin, one limitation of the CA relies on the fact that what people reasonably value as a life worth living or as something worth doing, is inescapably connected to the social values in which individuals are embedded. Therefore, an analysis of those political, civil, economic, and religious values shaping people's decisions is pivotal if the CA attempts to have any significance in present economics. Hence, not only is there a need to distinguish the exercise of valuing (which means bringing on board the social values affecting the individual) from capabilities, as Alkire (2002) has clearly explained, but the CA also necessitates interacting with psychology, sociology, history, education and other social sciences, including religion, in order to properly assess what people value and therefore their capabilities and wellbeing.

A common element in the critiques of both the 'outsiders' and 'insiders' is the centrality of the individual. This centrality, as Robeyns (2005) observes, has made some scholars interpret the CA as a form of philosophical liberalism. The best response to these series of critiques is the one Sen provides in his latest work: TIJ. With regard to the accusation of compliance with the *status quo* of injustices generated by the capitalist system, Sen clarifies that the CA has insistently proposed the need for going beyond the positionality of individual and local observation (TIJ:244-5). Not only has Sen expanded the notion of Adam Smith's 'impartial spectator',<sup>246</sup> but has also considered Marx's idea of 'objective illusion'. An illustration of the former is the openness to new horizons that the views of women from different societies have brought to places where women were culturally and systematically mistreated, and to the notion of freedom in general (e.g. the

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<sup>245</sup> See Chapter 8 and Part III.

<sup>246</sup> *Theory of Moral Sentiments* (1759).

case of Mary Wollstonecraft).<sup>247</sup> Indeed, an impartial spectator approach fosters open impartiality, i.e. from people from ‘outside’ a given society, as opposed to close impartiality –the procedure of making impartial judgements ‘in’ a given society (i.e. Rawls’s original position) (TIJ:123). Open impartiality, the basis the CA uses to explain global relations (TIJ:128-130) and responsibilities towards our neighbours (TIJ:170-1730),<sup>248</sup> evidences that the approach is a non-individualistic one. The use of Marx’s notion of ‘objective illusion’, on the other hand, substantiates that the CA is anything but individualistic. The ‘objective illusion’ consists in furthering the idea of objectivity, classically defined by Thomas Nagel (1986:5) as ‘a view or form of thought [that] is more objective than another if it relies less on the specifics of the individual’s makeup and position in the world, or on the character of the particular type of creature he is’ (TIJ:157). But positional observations are not necessarily ‘subjective’, but rather depend on the objective position on which the observer is standing. As Sen explains, there is no particular reason to see the statement ‘the sun and the moon look similar in size’ as having its source in the mind, or as being peculiar to an individual subject or to his mental operations (TIJ:158). For Marx (1863), the fairness of exchange in the labour market could well be an objective illusion, coming from the stand-point of the capitalist who cannot see the actual reality of the exploitation of the workers (ibid.). Objective illusions, Sen argues, are due to the blindness of positional objectivity. Conversely, when positional objectivity is addressed so as to overcome positional limitations and parochialism, then not only can the assessment of agency and wellbeing be noticeably improved, but there are also solid grounds for social change, particularly in the *status quo* of any given system needed to redress considerable injustices (TIJ: 167-173). In short, either through Smith or Marx, Sen claims that the “close-mindedness” of individualism, parochialism or any other ‘ism’ hinders human progress. The CA, therefore, far from being complicit with ‘individualism’ and the injustices of any system, offers, contrastingly, a framework for its renewal and change.

Likewise, with regard to the accusation of over-emphasising the individual over the social dimension of our existence, i.e. ‘methodological individualism’, Sen considers this criticism a grave misunderstanding of the CA, because not only does the CA assume that any thinking, decision or doing cannot be detached from its social phenomena, but it is also concerned with people’s ability to live a life they value, both in terms of what they consider valuable (e.g. taking part in the life of the community, or being associated without shame) and what influences operate on their values (e.g. the relevance of public reasoning in individual assessment). Therefore, Sen counters, it is hard ‘to envision cogently how persons in society can think, choose

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<sup>247</sup> See our explanation in 2.4.3.

<sup>248</sup> For more details see Part III.



or act without being influenced in one way or another by the nature of working of the world around them' (TIJ:244-5). This is the case in gender discrimination, exploitative legal patents, religious intolerance, poor education, etc., to all of which the CA has contributed in its social reformation.

For Sen, therefore, the CA has been 'quite unequivocal in not assuming any kind of a detached view of individuals from the society around them' (TIJ:245). Moreover, as further irrefutable evidence, he dedicates a whole chapter of TIJ to expound on the relation between the individual and social institutions (TIJ:75-86). He begins by quoting the Emperor Ashoka, who in the 3<sup>rd</sup> century B.C., whilst implementing the rules for public discussions, encouraged statesmen, as fitting conduct, to honour others; for to honour others is to honour oneself (TIJ:76). This behavioural approach, replicated by Sen in the CA, is a way of advancing tolerance and justice in society (TIJ:77), but it by no means ignores the role of institutions and social organisations, not least the social dimension of the individual. On the contrary, and as will be further discussed in Part III, an idea of justice cannot but give high importance to the role of institutions (TIJ:82). However, such institutional roles are not to be addressed as absolutes, but rather as part of peoples' lives. While the CA acknowledges the inter-dependence between individuals and institutions, it does not accept the 'deterministic' institutional view, with which an institution can always dictate individual behaviour. The role of 'the agent' is always crucial for both the individual and the institution to flourish. To summarise, for the CA, advancing the wellbeing and freedom of people is pivotal for institutions, the state and individuals in a society. Therefore, there is little room to accuse the CA of overlooking the social dimension of human beings.

A slightly different 'insider' approach is that of Martha Nussbaum (2000, 2004, 2006, 2011), who claims that Sen's version of the CA (she has her own) is too general, abstract and incomplete, which makes it irrelevant for concrete policy action. Thus, she proposes a specific list of ten capabilities which, she argues, any Western liberal democracy can –and ought- to include in its constitution so as to translate them into political action. Although the list can be seen as corseting the approach altogether, Nussbaum claims that it is an open-ended one. Firstly, because it is by no means definite and unchangeable, and secondly, because it is inextricably related to universal human values, such as life (being able to live to the end of a normal life, not dying prematurely), bodily health, integrity and movement –including security and reproduction choices-, senses, imagination, thought and emotions (being able to cultivate them and use them), religious freedom, affiliation and life planning, political control over one's environment and the capacity of relation with nature, and the human ability to play, laugh and enjoy. Addressing this

issue would require space not available here.<sup>249</sup> Yet, what we can assert is that Nussbaum's list of capabilities has its advantages and inconveniences. Among the advantages, it offers a more concrete guidance so as to connect the CA with liberal policies while respecting human rights. But the main disadvantage is that such connection is restricted to a specific political framework, certainly not yet widespread in developing countries (Deneulin 2013b). 'Pros & cons' aside, the fact is that both Nussbaum and Sen aim at universality and at replacing the prevailing political-economic utilitarian theory of development, although through different means. It is precisely this universal aim that has triggered another critique.

As Alkire (2002b)<sup>250</sup> points out, the universal aim of human development (HD) has its difficulties, one being the definition of the dimensions of wellbeing that need to be assessed and promoted. When wellbeing and ill-being (poverty) are approached in a multidimensional way, as in the CA, such definition is scientifically and practically crucial. If 'poverty is-to-be-reduced' and people's 'wellbeing to-be-enhanced', there is an epistemological need to guarantee an empirical analysis of the multidimensional HD objectives (ibid.:182). Besides, from a practical perspective, communities need 'effective methodologies to evaluate 'tradeoffs' and 'unintended impacts' of HD projects and processes (ibid.:183). Furthermore, if dimensions of HD are not specified, the 'multidimensional approach' would easily be misinterpreted and rejected in pluralistic societies, as has occurred with other similar approaches. However, as Alkire recognises, there is no consensus in the HD literature about these definitions. Besides, there are grave technical complications regarding the collection and interpretation of data for each eventual defined dimension. Therefore, it could be argued that the HD approach –thus the CA too–, though theoretically true, becomes unreal and unable to be universally proposed.

Still, Sen would counter-argue that, since 'the capability perspective is inescapably pluralistic' (1999:76), the way in which functionings and capabilities of varied importance are weighted, should always remain open to the public valuation process (ibid.). Moreover, it is precisely this 'plurality' and 'openness' that guarantee a heterogeneous universality (ibid.: 77). Additionally, they also enrich the HD evaluative perspective and process, as diverse cultural representations may tune into different descriptions of HD and wellbeing dimensions (ibid.). Although Sen supports the studies and practices for identifying and defining basic capabilities in a special context, he, unlike Nussbaum, refuses to define a 'fixed and forever list', a 'pre-

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<sup>249</sup> For a thorough analysis of Sen and Nussbaum's differences, see Gasper (1997).

<sup>250</sup> Alkire addresses the critique of the CA regarding the difficulty to measure poverty or development. She has created a multi-dimensional poverty index (Oxford Poverty Human Index: OPHI), a further development of the CA, addressing the difficulties in measuring poverty and development multi-dimensionally. For more about such index, see <http://www.ophi.org.uk/>

determined authoritative list' which may 'undermine peoples' agency' (Alkire and Deneulin 2009:45). Far from considering the weakness of the approach, he would rather see it as a strength, precisely because of the capacity for adaptation of different political-economic models. Otherwise, a reform of the global liberal system would be very much restricted to a handful of Western countries or to a specific set of citizens. If this were the case, Sen's ability to prophesy in the current global economic system would be compromised.

## 6.6. CA and international development

Critiques and discussions aside, it is worth highlighting the practical importance of the CA, particularly through the influence it has had in international development, in national policies and in local programmes.

For example, the Human Development Index (HDI),<sup>251</sup> deployed now by the UNDP, has redressed the balance of previous international indices on growth, such as the Gross National Product (GNP) or Gross Domestic Product (GDP), fixed on the material incomes-outgoings a country experiences in a given period. Conversely, for the HDI, the true wealth of a nation is its people (UNDP, 2013), and the way to promote actual progress is to help people increase their choices, particularly on topics around health, education, and standards of living (e.g. shelter, security, community participation, dignity of work, ethnicity or religion, etc.). Growth measurement, therefore, should be deployed around these multidimensional issues, rather than exclusively on nations' balance sheets. No wonder that for Sen, the HDI is a clear example of how to put the CA into practice (Sen 1999).

The HDI has generated a new approach to economic development in the global community, which not only has proved to be effective in helping countries to actually progress, but has also triggered other international organisations, such as the World Bank, to gradually (perhaps too slowly) incorporate different dimensions of human life so as to measure economic progress. This shift does not mean that the way the world is being developed now is better than in the 1950s or 1960s. Nor does it mean that current international organisations are effectively responding to the needs of present development, or that developing countries can easily find their way out of poverty, or that the global disadvantaged may have access to the benefits of the global economy. The causes of this are multiple and contested and go beyond the scope of this thesis. Nonetheless, the shift promoted by HDI among international development agencies has brought a glimmer of hope for the actual progress of humanity within the present globalisation process,

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<sup>251</sup> See Introduction(ii).

because economic development, within this framework, can be neither promoted nor measured whilst side-lining human beings. Economic development could be national, domestic and material, but it is also, and primarily, human. The more interconnected economies, corporations and human beings are in the world, the more important it is to analyse how their economic activities, and their success or failure, actually affect concrete human beings and their quality of life. For this reason, programmes under this paradigm, which are influenced by the CA, are known as 'human development' programmes, rather than merely economic ones.

The UNDP have recently furthered their policies based on HDI into more specifically local ones with valuable results, as in the case of some national human development reports (NHDR), e.g. the *NHDR of Dominican Republic 2005*, which analyses the country's socio-economic insertion in the globalisation process. The Report illustrates how the exemplary economic growth of the Dominican Republic of the last 50 years, which was the highest and the least volatile of the region (Latin America and Caribbean), has not been translated into proportional social welfare improvements, in other words, has not improved peoples' wellbeing. While being more focused on concrete issues of the region and countries, yet still maintaining a global view, these reports have become more accurate and offer substantial information to policy makers willing to promote holistic progress. For example, in the latest *NHDR of the Dominican Republic 2008*, a thorough study was conducted on the 'empowerment and participation' of poor people in different regions of the country, providing concrete and precise information on the areas in which development policies should be focused.<sup>252</sup>

The CA is being applied not only in the international-national arena, but also in small-scale development programmes of different kinds. Just to give one example among many; a recent empirical study of socio-economic analysis in the slums in Buenos Aires (Mitchell 2012), based on the CA, has concluded that some institutions or civil society organisations, such as local public schools and the Catholic Church, have greatly contributed to the advancement of both individual and collective capabilities in the marginalised urban communities. Without these kinds of investigations, ordinary assessment of development would have never been able to empirically confirm that, for instance, the aforementioned civil society organisations are *efficient*, foster *equity*, and advance peoples' *empowerment*.

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<sup>252</sup> Relying on these reports for fostering public policies requires, however, a strong political will and commitment, not necessarily found in many Latin American politicians.

They are more *efficient* than other institutions and the State, because they contribute to social integration in a way greater institutions cannot.<sup>253</sup> Although Argentina's UN development indexes reflect the good progress of the country in different areas during the last two decades (see UNDP 2013c), in that same period the population living in slums in Buenos Aires has dramatically increased, reinforcing the territorial concentration of poverty which contributes to escalating social segregation. The extreme conditions of living in those places can often corrode the macro-evaluated achievements of State figures as, for example, high levels of school attendance. As Mitchell (2012) shows, within slums located next to affluent areas, a high level of education does not necessarily reduce the propensity to be poor. By applying the CA to their research, Mitchell et al discovered that there is a need to overcome what is known as the 'neighbourhood effect', which limits an improvement in the slum residents' quality of life, despite their receiving basic education, due to the surrounding social inequality. An efficient way of overcoming this, they argue, is by promoting programmes of integration, for instance, regarding differences of nationality or living areas. According to a survey produced by the Catholic University in 2011, six out of ten surveyed households responded that where they live within the slums and their nationality are sources of serious conflict.<sup>254</sup> However, despite the large number of organisations providing services in those slums -including six human rights organisations-, there are just a few working specifically on those two areas, a major concern among slum dwellers. These institutions have programmes that, for instance, bring together local residents to work toward collective goals. Among them, the Catholic Church, either directly through specific human development projects (e.g. day-care nurseries), or indirectly through religious activity that contributes to reducing violence in the community and promotes unity and reconciliation (e.g. an inclusive liturgy, catechesis teachings, popular pilgrimages to sanctuaries of the Virgin Mary boosted by devotees from Paraguay or Peru), has proved to enhance social cohesion. This is confirmed by the fact that one in five outside organisations working in those slums, consider their partnership with the Catholic Church as crucial for the achievement of their development goals.

Mitchell's research (2012) also stresses the contribution civil society organisations make to *equity* goals, because they promote equality in terms of expanding access to social opportunities, basic entitlements and information for disadvantaged groups. Based on a wider understanding than the mere classic economic one of poverty and wealth (thanks to the CA), the research indicates that slum dwellers suffer from a noticeable unequal social structure: e.g. 80% do not have health insurance and depend only on the overcrowded public health centres and hospitals,

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<sup>253</sup> In the language of CST, this is known as the 'principle of subsidiarity' (*Compendium*, 185-188).

<sup>254</sup> Although the main source of conflict is considered the gang fights, 'areas' and 'nationality' occupy the second place in importance (Macció and Léopore 2012). See also Groisman and Suarez (2009).

in contrast to the 15% of citizens living outside slums. Consequently, 13% of adult women living in a slum in the south of the city have given birth to a child who later died, compared with 8% of women in surrounding areas and only 4% in the rest of the city. Similarly, 60% of the slum residents suffer from housing problems, in contrast to 9% of the rest of the citizens. Even in areas where the disparity between 'slum dwellers' and 'citizens' is not so wide (e.g. access to the labour market), the quality of access is markedly inferior, 14% compared to 26%. For instance, 2/3 of salaried employees in slums work in the informal sector, contrasting with less than 1/3 of non-slum employees. As a result, slum dwellers with access to work have fewer opportunities than ordinary citizens to get a stable job and to receive welfare benefits -often limited to formal employees-, despite the fact that those in the slums are more needy than the rest. But applying the CA is not merely useful to measure inequality. Mitchell's research assesses the way civil society organisations tackle this topic, and concludes that some programmes of those organisations are better equipped than State public policies to deal with the nuances of human-development equity goals. This is partly because, unlike the State, they never restrict these goals to mathematical minimum wages or poverty lines. As explained before, what matters most is the set of capabilities people enjoy to make a life worth living, capabilities that enable them to translate affluence into wellbeing. But however skilful these organisations may be, most of them lack the funding that the State has. In order to redress inequality, good relationships between these organisations and the State have become more crucial than ever, yet they are far from being smooth, as research shows.<sup>255</sup>

Finally, Mitchell (2012) proves that civil society organisations' contribution to people's *agency* is pivotal, especially as they stimulate trust and generate social network. This is the case of those institutions instilling vertical and horizontal sociability, the former being institutional participation, the latter focused on reciprocal relationships and assistance between community members. To the surprise of many, despite the hierarchical structure of the Catholic Church, one of the slums<sup>256</sup> showed that the Church has the highest participation rate of the area, followed by school cooperatives and soup-kitchens. In another slum,<sup>257</sup> the Church's participation rate was still high, coming second after the soup-kitchens.<sup>258</sup> The research also shows that the level of participation is closely related to the level of confidence community members have in both the

<sup>255</sup> For more on CA and inequality, see Chapter 12.

<sup>256</sup> In 'Barracas', in the south of Buenos Aires.

<sup>257</sup> In 'Bajo Flores', right in the centre of the City.

<sup>258</sup> These figures, however, do not justify an uncritical analysis of the institutional Church, because the participation percentages for any institution -the Church included-, do not surpass 40%. Rather than considering it a triumph to be more trusted than others, the Church should question why, if the majority of the population in the slums is Catholic, and if the Church is helping all the dwellers to increase their wellbeing, it does not have more levels of participation. Part-III furthers this idea by proposing an alliance with the CA.

institutions and their leaders. Although the Catholic Church is not gaining popularity in Argentina for various reasons which we cannot address herein, 76% of respondents have a high level or at least some confidence in the Church as an institution, and 72% trust Catholic priests, in contrast to 38% who trust other social organisation and a mere 27% who have confidence in their respective leaders. One reason for this high level of trust was the emotional support received through personal conversations, especially from Parish priests. In fact, the research discovered that more than 70% of slum dwellers consider dialogical and emotional relations decisive in promoting trust. A vast majority of them revealed that they either dedicated considerable time to listening to the problems of friends and neighbours, or that others took time to listen to their own problems. A substantial majority also consider that interpersonal relations are critical not just for social cohesion, but also to encourage the exchange of material goods or clothing, or the borrowing and lending of money, i.e. economic relations. This gives credit to the CA criticism of mainstream economics and of the 'hard-line' of development, which mistakenly assumed that business is mainly about the maximisation of profits. In the same vein, most of the slum dwellers manifested that, although they do not pay taxes, they would be willing to do so for higher quality services (e.g. education, access to water and electricity, health care service, rubbish recollection, etc.). This latter revelation was made possible, due to the application of the principles of the CA, and challenges the tendency of Latin American development projects to 'assistencialism', a governmental attitude to give immediate assistance to the very poor, normally in exchange for votes, without any long-term planning, without increasing their capacity of agency, of being their own instigators of social change.

If the CA is so important for international, national and local development programmes, and if the application of it reveals that some of the Catholic programmes concerning wellbeing and agency are on the right track in terms of enhancing freedom and wellbeing, the CA is worth considering as a partner to Catholic theology so as to explore new routes to help improve the standard of living of the very poor, as is argued in Part III.

## 6.7. Conclusion

We have analysed in detail why the CA is considered a philosophical framework proposed as an alternative to utilitarianism, welfarism or classical liberalism. Assessing peoples' wellbeing goes beyond the maximisation of profit, or measures of subjective happiness. Wellbeing needs to be studied according to the agency people have to apply their values in order to live what they consider a good life, either by 'doing' what they believe is right, or just by 'being' according to their true identity. Their considerations or beliefs, however, need to be *reasonable* and *free*.

Reasonable means that individuals ought to have personal reasons for their decisions, which are never isolated but always contested or complemented by other peoples' reasons, i.e. public reason. Free, not merely from external oppression (negative freedom), but also free to aspire to achieve socio-political-economic goals in a given society (instrumental freedom), free to identify their actual needs (constructive freedom), free to enjoy of a minimum set of functionings that allow them to live -not just to survive- (constitutive freedom), and free to appraise different lifestyles and choose the one they value the most (substantive freedom).

This Chapter has provided a detailed explanation of why, for the CA, the measure of progress or development is freedom, although understood differently from the libertarians or welfarists. Development is introduced 'as a process of expanding the real freedoms that people enjoy': capabilities (Sen 1999:3). Unlike the views that identify development with personal income, or with GDP, or with industrialisation, or with the advancement in technology, or with social modernisation, this approach has the advantage that it can be focused not only on means (money, commodities, technology, industries, etc.), but also on the ends of development, i.e. actual people. Within that framework, the success of policies, states and organizations, lies in their ability to remove major sources of 'un-freedom' (e.g. lack of healthcare, or education, or participation) and to provide opportunities for people to enhance their capabilities.

The importance the CA can have in international, national and local development programmes, has been highlighted. As this influence is expected to continue in the near future, it is fair to believe that the dialogue between the CA with a different, but compatible, framework of progress and human flourishing, such as the one of CST, can improve development models and policies for the betterment of actual people, particularly the poor.

Finally, we have argued, alongside Deneulin (2014), that the CA is characterised by a set of words which conform to a specific language for development studies (e.g. functionings-capabilities, agency, development, freedom, wellbeing, justice), permitting the articulation of a social reality from the perspective of wellbeing and agency. Although the key-concepts of the CA analysed offer a channel of communication with other sciences, CST included, those key-words can be combined or prioritised in different ways, depending on the situations (cf. Deneulin 2014). This situational approach to ethics grants the CA a great versatility to be adapted to different theories on the one hand, and to be subject to different interpretations on the other. Our interpretation is based on a narrative approach to Sen's ideas, mediated through the lens of CST. We have opted to frame the CA wording in two groups: (i) development/freedom, and (ii)



wellbeing/justice. This chapter has studied the former, while the next chapter will discuss the latter. The idea of justice, indeed, is the inevitable outcome of the development of the CA.

## 7. Wellbeing as justice

The previous chapter analysed in detail the CA, with which Sen argues for the idea of freedom and its role in development-economic processes. However, the expansion of freedoms people enjoy, championed by the CA, cannot be limited to individual wellbeing. Precisely because freedom is exercised in a given social context, and because it is value-laden, the CA necessarily poses the question about the nature of social relations and their competing values. Wellbeing, therefore, cannot be conceived without an *idea of justice*, which is the title of Sen's magnum opus (TIJ).

This chapter *firstly* examines TIJ's main points.<sup>259</sup> It describes how TIJ's crucial goal is to reduce actual injustices worldwide, albeit imperfectly, and how, in order to achieve it practically, it proposes the use of a fundamental tool, i.e. a comparative-impartial analysis of social choices through democratic processes. *Secondly*, the chapter studies how TIJ operates in practice. Sen proposes the classical Aristotelian example of 'the flute' (there is only one flute for three children who would like to play it) to test the theory and also to reveal its eclectic and consequentialist philosophical background. We will add to the flute tale a concrete example, i.e. food security in Argentina, relying on the data about child malnutrition, and questioning how TIJ can be applied in that case. This case study will identify three main caveats of TIJ concerning: (i) entitlement and the problem of the communicative process; (ii) interdependency and the problem of structural causes of injustice; and (iii) the problem of selecting the right thing to do when the nature of a good society and of civic individual virtues is side-lined. In order to overcome those limitations, we will argue that TIJ needs to interact with other theories, such as CST. Without those interactions, TIJ could fail in helping to reduce actual injustices, because it might either get trapped in intellectual polemics, or worse, foment an unjust state of affairs. *Finally*, the chapter questions whether CST can be a good interlocutor with TIJ in order to overcome actual injustices. The main points where Sen's ideas can interact with CST will be highlighted, as well as their fundamental points of disagreement. This will open the door to the third and last Part of this thesis, where the CST-CA interaction will be further explored.

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<sup>259</sup> This chapter is neither a study of different theories of justice throughout history, nor a description of the *status quo* of justice in our time. Instead, the study is focused on "justice" within the context of modern development processes.

## 7.1. The Idea of Justice (TIJ)

Sen is well aware that the process of development is not perfect. To respond to the new unjust situations arising worldwide due to the new globalisation process, the freedom-approach to development needs a reinterpretation of justice –hence his book in 2009.

The goal of TIJ is to help reduce actual injustices worldwide, albeit imperfectly, by providing a comparative-impartial framework analysis of social choices through democratic processes, not necessarily restricted to formal democratic structures. For this, Sen proposes to shift substantially the departure point of Rawls' prevailing *Theory of Justice* (1971).<sup>260</sup> Instead of discussing just institutions and rules, from which justice may ensue, or seeking an ideal just society which has never existed and never will, as the social contract theorists do, Sen suggests beginning with a comparative approach towards policies that may actually reduce injustices and foster the advancement of justice (TIJ:9). As Sen explains, there is no point in comparing the nature of a Picasso with the nature of a Michelangelo, although it could be useful for art studies to compare the processes and techniques involved in the production of those outstanding paintings. Analogically, discussions about justice should look at processes and policies that foster or hinder just situations, as well as those which foment or prevent injustices worldwide.<sup>261</sup>

Sen argues that the questions on justice are pivotal to identifying 'redressable injustices' and analysing how to help justice progress (TIJ:9). By asking what a just society and perfect institutions are, a theory of justice becomes not only unfeasible, but also redundant (ibid.). First, it is not feasible because the analysis starts with, and cannot move forward from, the 'nature of the just society' (TIJ:192). Even with impartial open-minded scrutiny, public agreement on the hypothetical situations of justice, and diagnosis of their consequent injustices, would rarely be achieved (ibid.). Hence, while the poor suffer grave injustices today, philosophers and policy-makers are trapped in discussion about ideal scenarios, distracting them from the core issues of real unfair situations (TIJ:390). Second, when deciding which values must prevail in order to reduce injustice, the decision-makers should choose 'among feasible alternatives' (TIJ:9). It is a waste of time and effort to select *utopia* when there are so many actual instances where action against evil is urged. For Sen, an over-concern about 'right institutions and rules' precludes addressing the dynamic of injustices and the complexities of real just solutions. While seeking justice as *niti*, an ancient Sanskrit way of expressing an 'arrangement-focused view of justice'

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<sup>260</sup> Sen dedicates the book to Rawls, described as the most influential political philosopher of the XX century.

<sup>261</sup> The focus on processes when addressing 'justice' is coherent with the focus of processes when analysing capabilities, as explained in the previous chapter.

(TIJ:10), a theory of justice overlooks what matters most, i.e., the comprehensive outcomes, or, what is called in the same Sanskrit tradition, *nyaya* (TIJ:21). Indeed, *niti* is focused on thinking and building up appropriate social institutions, which supposedly forge just personal behaviour. Although ‘any theory of justice has to give an important place to the role of institutions’ (TIJ:82), the overriding point is to generate institutions that actually ‘promote justice, rather than treating the institutions as themselves manifestations of justice’ (ibid.). When this happens, a theory of justice risks becoming a ‘fundamentalist’ conception, divorced from reality. This is why Sen renders *niti* as ‘transcendental institutionalism’, which constrains the ideas of justice around perfect and unreal just societies and institutions, as with Rawls’s theory (TIJ:401).

In contrast, Sen asserts that ‘debates about justice –if they are to relate to practicalities– cannot but be about comparisons’ (TIJ:400). For him, this comparative process firstly needs a certain degree of impartiality, understood in the terms of Adam Smith’s (1790) ‘impartial spectator’ (TIJ:126). Without this minimum objectivity, which distances us from our sentiments regarding injustices and helps us transcend our partial views, the process is unable to produce reasonable and practical outcomes (TIJ:149). Yet, Sen clarifies that this minimum objectivity does not ignore the difficulty –if not the impossibility– of reading socio-economic situations with total objectivity. Those who claim such objectivity for themselves might be having what Marx (1863) calls an ‘objective illusion’,<sup>262</sup> as when capitalists see the objective fairness of exchange in the labour market; their stand-point is a privileged position that usually prevents them from being aware of the actual exploitation of the workers (TIJ:163).

Secondly, the comparative process must take place in public debates, where reasonable value-laden propositions are weighed up by representatives of all sectors involved in the problems (TIJ:324). Sen is clear that public balloting is merely one aspect of democracy that needs to be complemented with authentic public reasoning. Far from being limited to parliamentary discussions, public reasoning involves citizens’ free speech, free access to information and freedom of dissent (TIJ:327). The government ‘by discussion’, therefore, goes beyond traditional republican ways, involving the participation of NGOs, social movements or the like, giving individuals the opportunity to openly express ideas related to what they have reason to value, and even heeding protest groups campaigning against injustices (TIJ:365).

However, it cannot be expected that through a comparative process, based on public reasoning, a perfect social organisation or ideal justice will ensue. Still, according to Sen, the comparative framework is not threatened by the potential imperfections of the agreed solutions

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<sup>262</sup> For more about A. Smith’s impartial spectator and K. Marx’s objective illusion, see Chapter 6.4.1.

(TIJ:392).<sup>263</sup> On the contrary, despite how difficult it is for individuals or groups to combine into their propositions the perspectives of others' just solutions, the need to incorporate dissonant voices and to move from a 'unifocal' view is essential to tackle injustices (TIJ:169). For a global justice to be enhanced, therefore, the discussion cannot be limited to 'parochial' cases or thoughts (TIJ:403), because other peoples' perspectives 'broaden our own relevant principles' and impact on our sense of justice (TIJ:402). This has occurred, for instance, in the vindication of women's rights upheld especially by Wollstonecraft,<sup>264</sup> in M.L. King's crusade against racial discrimination, and in Gandhi's championing of independence and identity (TIJ:391.403). These heterogeneous perspectives have helped the whole world to take notice of the appalling inequitable treatment certain groups receive due to their gender, race or nationality. Furthermore, as Sen (2001) has illustrated, justice cannot be confined nowadays within national borders, and involves the interaction of cultures and the global inter-dependence of individuals and groups, particularly through communication, trade, climate and security issues (TIJ:402).

Sen's objections to Rawls and his *niti* approach to justice may be difficult for contemporary minds to absorb for two reasons in particular. Firstly, as Davis (2011:3), an expert in Sen and Rawls points out, transcendental institutionalism 'has the ready appeal of seeming to be an objective approach to justice, on the grounds that just institutions would seem to stand above, and be independent of, the ever-occurring dispute and conflict between people over what is just'. This claim to objectivity usually attracts liberal thinkers as well as grass-root workers struggling to promote justice in a pluralistic society. However, as Sen points out, institutions *per se* are not objective. To achieve a realistic form of objectivity, we need to question the process by which people have reached that institutional understanding of justice (TIJ:43). In such a process, reasons and emotions, as well as philosophical and religious beliefs must be taken into account (TIJ:41). In other words, it is inappropriate 'to begin with a set of ideas transcendently removed from the social process of exchange', and then to download their abstract normative logic into people's ideas and societal structures (Davis 2011:3). Rather, the truly objective process is a bottom-up one, starting from the 'human logic of disagreement and resolution to rank social alternatives by systems of rankings that are plural and competitive' (ibid.).<sup>265</sup>

The second reason for which 'transcendental institutionalism' might be more appealing to current global citizens than Sen's view, is the fact that it fits well with the anthropology of main-

<sup>263</sup> This is related with CST idea of justice as 'eschatological' (see 3.2.3; 3.4; 7.3; 12.1.2)

<sup>264</sup> See 6.4.3. and 6.5.

<sup>265</sup> This is important for CST for two reasons: (i) it resonates with CST methodology and bottom-up approach, and an alliance between TIJ/CA and CA in this regard may help to put forward the approach in economic policies; and (ii) it refines CST's understanding of plurality, hence bring nuance to the notion of the common good.

stream economics: the *homo economicus*.<sup>266</sup> Indeed, a transcendental approach to justice assumes that people are 'rationally motivated', and so under the 'right circumstances' they will choose just institutions (ibid.). Right circumstances, in economic terms, means 'right incentives', suggesting that individuals will always opt for the best in their self-interest if they are able to do so. In his fight against utilitarianism and preference-based utility behaviour, Rawls argues that, in order to design fair institutions regardless of what different people think and believe about the nature of justice, we need to imagine a veil of ignorance. Without knowing in which position we will be in a given society, people will choose the more objective, impartial and right situations. However, as Sen claims, this device (veil) does not explain why in some circumstances self-interest produces disinterest, or why people act impartially even when their own interests conflict with others (TIJ:67).<sup>267</sup> Rawls's approach assumes that there is an original position of total inequality on the one hand, and that there is a straightforward way to impartiality and fairness on the other (i.e. that we aim at fair situations when we sideline our vested interests) (TIJ:10).

In addition to considering these assumptions as misleading, Sen's criticism of Rawls's transcendentalism challenges, indirectly, the whole anthropological notion of the liberal *homo economicus* (Davis 2011:4). By admitting values that go beyond self-interest in the process of evaluating justice, Sen suggests that individuals are not merely 'responsive', reacting according to their subjective preferences, but also 'reflective', reasoning about how they 'ought to act' according to their commitments. For Sen, this reasoning is advanced by a twofold process: (a) the personal need to change our positional situation; and (b) the interaction with others through an actual open process of public reasoning. Following Rawls, Sen argues that the exercise of changing our positional view is crucial so as to transcend 'the limitations of our positional perspective' and therefore being enabled to critically analyse our prevailing ethical, political and legal thoughts (TIJ:155). Yet, this shift of perspective falls short if it is only abstract and if it still depends on our own self-pre-conceptions, as happens with Rawls's veil of ignorance. Rather, it should come from real cases, often from distant neighbours, who will help us to overcome any

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<sup>266</sup> Although the 'free and reasonable' individuals of the veil of ignorance is different from the 'rational *homo economicus*', both make strong assumptions about human behaviour and 'human nature'.

<sup>267</sup> Far from being a mere academic discussion between two colossal thinkers, it may help to understand some Parables of the Kingdom related to economic-justice. People more akin to Rawls' view would raise an eyebrow when listening to the parables and their call for including non-self-interest approaches –based on religious values– within economic transactions. However, Sen, whose view furthers Rawls's already open view regarding impartiality and justice contends that, within the social process of exchange, religious beliefs and other non-utilitarian reasons do influence people's behaviour. As part of the economic equation, therefore, such 'reasons' need to be taken more seriously by economists, and if this is true, the Parables offer a way to further Sen's intuitions on the way to promote justice.

positional prejudice or exclusive subjective values (e.g. Wollstonecraft, King, and Gandhi's cases). Sen argues this is wisely epitomised by the parable of *The Good Samaritan*,<sup>268</sup> a surprising explanation coming from a self-proclaimed non-believer with a Hindu background, but affirming our earlier argument that the Bible-like great art- can transcend its particular context offering meaning across historical and cultural differences. It is by these dynamic positional changes that agents can further their understanding of social commitments. In addition, it is through an open process of public reasoning, that these agents, with their diverse views on justice, can find concrete paths towards reducing injustices.

To summarise, the comparative approach to justice is, according to Sen, better equipped to buttress just and global changes than a 'transcendental institutionalist' approach (TIJ:410).<sup>269</sup> Thus, TIJ proposes to replace the latter, grounded on *social contract theories*, with an idea of justice based on *social choice theories*, 'initiated by Condorcet in the eighteenth century and firmly established by Kenneth Arrow in our time' (ibid.). This does not mean that Sen discards Rawls' theory of justice completely. On the contrary, Sen acknowledges that Rawls has recovered some of the forgotten classical roles of justice, such as: (i) *impartiality*, crucial in an uneven liberal world, (ii) *universality*, vital to combat the widespread utilitarian socio-economic dominant conceptions, (iii) *balance*, essential to address issues of political power in the new paths of progress in general, or (iv) a *normative framework* to judge, probably the most powerful contribution due to its connection with the respect for and promotion of HR worldwide (TIJ:62-65). Still, Rawls and his followers, according to Sen, are not able to move a step forward and give back to justice what originally belonged to her: the creativity, dynamism and vitality to transform the way in which people live. Sen endeavours to approach this colossal task, not without difficulty and limitations, some of which are discussed below.

Notwithstanding Sen's disagreement with Rawls, detailed analysis of which exceeds the scope of this dissertation, one can deduce from the above explanation of TIJ that agents' wellbeing is also about redressing injustices in society and fostering individuals' commitments towards others. On the one hand, this resonates with CST's idea of justice, a personal and social virtue through which we deploy our aspirations to live together (in community), by respecting each other and by bringing about good to all, hence expanding the Kingdom of God on earth (*Compendium*, 62-65).<sup>270</sup> On the other hand, this poses the question about TIJ's applicability.

<sup>268</sup> For an explanation of the parable see 2.1.

<sup>269</sup> For a critical review of Sen's approach see Islam (2009). For a critical review of the basis of TIJ, i.e. the capability approach, see Nussbaum (1988), Sudgen (2006), Cohen (2011) and Pogge (2010) and the literature mentioned in 6.5.

<sup>270</sup> For more on justice and CST, see Part III.

How can a comparative approach and public reasoning processes promote justice, and therefore increase wellbeing?

## 7.2. TIJ in practice

To illustrate how TIJ can work in practice, Sen assesses the prototype tale of distributive justice regarding the three children and a flute.<sup>271</sup> The example depicts the limitations of what he called one-sighted or simplistic ethical approaches to justice. While ‘hedonist utilitarians’ may allocate the flute to the child who can play it better so that the pleasure of both the player and listeners is maximised, ‘economic egalitarians’ would probably give it to the poorest of the three children in order to pursue the reduction of the gap between the richer and the poorer in society. Moreover, ‘nonsense libertarians’ or some ‘neo-Marxists’ will assign the instrument to the maker who deserves the benefit of his/her work (TIJ:14). However, for Sen, actual solutions to these cases are complex, and therefore required complex distributional approaches that can include, but also go beyond, single pre-conceived views of what is just.

Given that TIJ is a further development of the CA, hence a theoretical framework with which to evaluate wellbeing and justice, it does not provide concrete examples of how those complex solutions can operate in complicated global situations. Therefore, it is the task of the interpreter to imagine how TIJ would work on concrete examples related to development, such as reducing malnutrition in developing countries such as Argentina.

### 7.2.1. Food Security in Argentina

In a country which used to be the world’s granary’, whose main source of income is agro-industry, the fact that millions of children face food insecurity, cannot but be understood as unjust. On that assumption, how would the application of TIJ work?

The first goal of the UN *Millennium Development Goals* for 2015 is to eradicate extreme poverty and hunger. This is threefold: (i) reduce by half the proportion of people living on less than one dollar a day; (ii) achieve full and productive employment and decent work for all, including women and young people; and (iii) reduce by half the proportion of people who suffer from hunger. Argentina has committed itself to such goals. Regarding the third target, during the last decade the country has deployed a number of public policies coordinating different

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<sup>271</sup> The tale of the three children and the flute is a further development of a parable Sen presents in *DF* (1999:54-55) about distributional justice, in which he depicts the difficulty in choosing ‘the right’ person for a work post: Annapurna has a choice between three unemployed labourers who would like the job of cleaning up her garden: (a) Dino, the poorest, Bishanno, the most unhappy, and Rogini, a chronic- sick woman whose eventual wages would help her to find a cure. Which one should she choose? For a comprehensive account of distributive justice, see Walzer (1983).



programmes on food security, aimed at guaranteeing access to food for the whole population. Through distribution of food for the poor, school feeding, communal meal programmes, maternal and infant health plans, and national security and emergency projects, the country managed to dramatically reduce the statistical figures on food insecurity between 2001 and 2005. However, an official survey (ENNYyS) in 2005 showed that some figures were still very high for a country with a sustained GDP increase of around 8% (e.g. 35% of children between 6 and 23 months old were found with anaemia) (Duran et al 2009). Since then, public policies have attempted to tackle this issue more effectively, going beyond the mere re-distribution of food. The 'Asignación Universal por Hijo', a social welfare benefit implemented in 2009 with the intention of targeting children and young people, especially those living in extreme poverty, and which, until 2011, covered almost two million poor households (Salvia 2011), deserves particular mention. However, a report from the Catholic University (2012 'Observatorio')<sup>272</sup> reveals that food insecurity is still a threat for the most vulnerable.

Unlike official statistics and programmes, which measure welfare according to the distribution of commodities or access to basic-human needs, Observatorio is based on the CA. By going beyond the metric of goods and resources –and what they might generate–, the study is focused on the capability of people to be nourished.<sup>273</sup> In other words, it has not only focused on the generator of eventual wellbeing (e.g. food), but also on the possibilities themselves, which do not vary uniformly with what generate them. Indeed, children in poor households can easily adjust their expectation of food downwardly, both in quantity and quality. But, as TIJ points out, it would be unfair to consider those children as overcoming food insecurity due to their modest tastes, or to believe they need less wherewithal to achieve food security. What matters is the intermediate between food and actual wellbeing, i.e. functionings and capabilities.

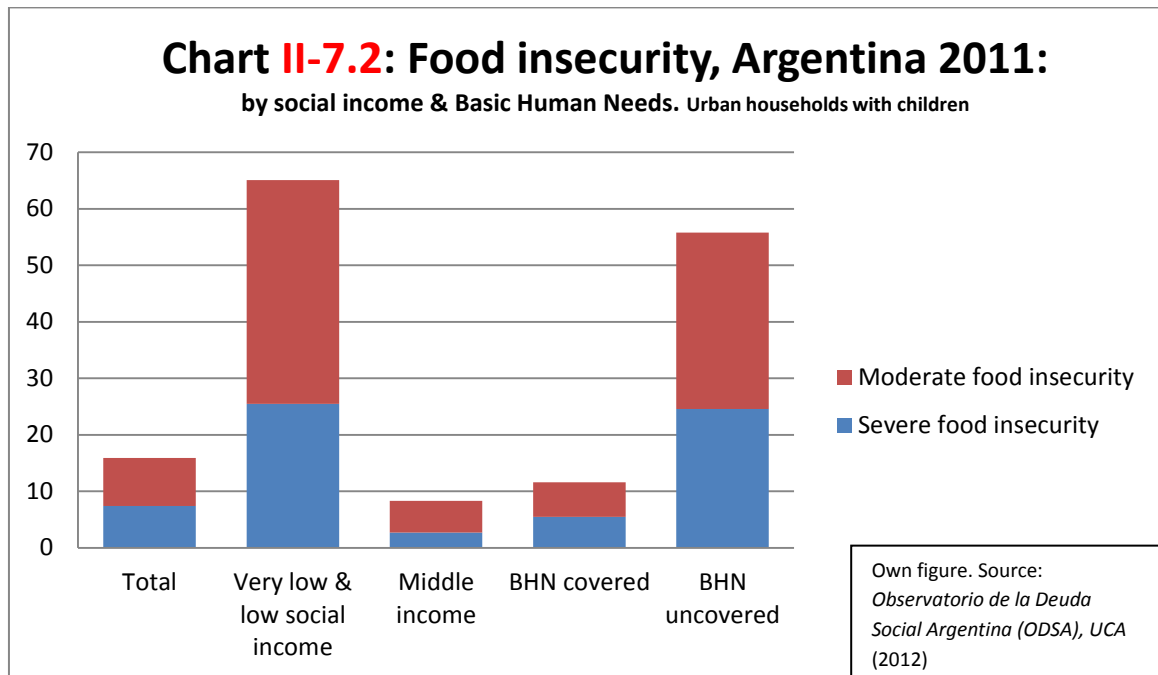
This approach permitted Observatorio to identify crucial nuanced information on food insecurity, in a sharper way than similar previous studies. Among the outcomes of the research, for instance, Observatorio identified a difference between 'moderate' and 'severe' food insecurity in diverse social classes –a difference that remains regardless of the food distributed among low classes by the Government and NGOs–. Children in poor households have a disproportionate risk of severe and moderate food insecurity, compared with children living in middle social income households (65.1% to 8.3%), as depicted in the Chart II-7.2 below. 22.5% of

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<sup>272</sup> Programa Observatorio de la Deuda Social Argentina–UCA (2012): 'Informe sobre la Inseguridad Alimentaria en la Argentina. Hogares Urbanos. Año 2011.' (A. Salvia, I. Tuñón I., and B. Musante, eds.). For practical reasons, we call this report 'Observatorio' 2012.

<sup>273</sup> For the technicalities and the way this empirical research was conducted, see Observatorio.

people with poor income were found to be suffering from severe insecurity (hunger), while 39.6 of the same social sector had to reduce the amount and quality of their daily diet (moderate insecurity). Also, more than 50% of households with children, but without basic human needs covered, were struggling to have stable access to food, in comparison with 11.6% of households with children with other basic human needs covered.<sup>274</sup>



More revealing in terms of food security was the discovery that households where women have sole charge are twice as likely to experience severe hunger than those led by men, whereas moderate food deficit is only slightly up in households where men are in charge. This exposes the fact that, apart from the structural conditionings (social income and basic human needs), there are some domestic conditions and capabilities which are key factors in food insecurity, particularly regarding gender.<sup>275</sup> In terms of justice and wellbeing, it also reveals that Argentina, despite being a food producer and exporter, cannot translate this potential into children's actual wellbeing (Lyach *et al* 2011).

Unfortunately, due to limitations of space, we cannot expound in depth the discoveries of this research. We have clarified, alongside Observatorio, that public policies on this particular

<sup>274</sup> This does not mean that the research is focused on basic needs. These are only used as a metric of comparison, alongside social income. Comparisons, as explained before, are pivotal for TIJ and its idea of redressing concrete unjust situations.

<sup>275</sup> Argentina's UNDP indicators (2013d) on gender position the country as one of the best in Latin America concerning gender equality. Yet, a closer examination on food by Observatorio reveals the flaw in such indicators, which do not consider the informal sector –hence not capturing the marginalised women- and for omitting approaches based on capabilities.

topic have substantially improved in the last decade. Can they make any difference? That would depend on different factors. The actual purpose of bringing this empirical study on board is to illustrate how the CA/TIJ can enrich measures of poverty and wellbeing. By so doing, it provides vital information for policymakers and development agents working in this field to deploy policies more effectively in the near future, going beyond food provision and availability, while being more focused on the capability of being nurtured.<sup>276</sup>

This case-study also depicts how TIJ would operate in a concrete specific situation which most people would admit is unjust. TIJ would *firstly* identify the situation as an injustice because food insecurity prevents millions of children from achieving their potential as human beings, from developing as humans. This capability achievement differs, as explained above, from food availability.<sup>277</sup> *Secondly*, it would deepen the analysis by comparing malnutrition in gender groups, religious groups and regions, and also by comparing how other countries are coping with the situation. Thus, it would rely on Observatorio and identify that urban children are relatively better off than rural ones, and that children in households with a permanent presence of a 'father' have 50% less chance of suffering from hunger than those with a single mother. Given that there is no comparison with other countries in similar situations, TIJ would either encourage new research on this topic or make some assumptions based on available data. *Thirdly*, an approach based on TIJ would work on the information from measurements published by a free press, even if it is done in an imperfect way.<sup>278</sup> This would generate strong reactions from people and organisations in Argentina and beyond, on the one hand, and it would strengthen public agency to the people affected, on the other. *Finally*, the last step would consist of providing a solution through 'public reasoning' (TIJ:327).

In short, these four steps may sound an oversimplification of TIJ. Yet, they indicate how Sen's idea of *justice*, through comparing states of affairs in *capability*, aims to discover the causes behind that outcome (e.g. low food capability achievement), and then offers a frame (i.e. 'public reasoning') as the way to find solutions that can improve people's *wellbeing*.

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<sup>276</sup> Food availability does not necessarily mean the enhancement of the capability of being nourished. Likewise, abundant national food production is not necessarily translated into a well-nourished population.

<sup>277</sup> Food insecurity can generate child malnutrition, which has a devastating effect on the basic development of children (UNICEF-WHO-World Bank, 2012). Also, an early paper of Sen (Sen and Sengupta 1983c) shows how women are worse off regarding child-nutrition, a fact sadly confirmed twenty years later by the World Bank (2005).

<sup>278</sup> We are aware that issues on how the data is obtained (poverty measures) and distributed (vested interest of the press) may complicate the scene (see DF:19-20; TIJ:118-9 and Rantanen 2005). Yet, for the purpose of this explanation, we need to put them aside.

### 7.3. TIJ and public reasoning: caveats and beyond

We explained, in the introduction to TIJ, why its focus lies in reducing actual injustices rather than in re-thinking an ideal notion of justice. By so doing, Sen attempts to shift the emphasis from Rawls's institutional justice or *nití*, towards a more capability-centred idea of justice or *nyaya*. In order to translate the idea of justice into action, Sen offers a comparative-impartial analysis of social choices through public reasoning processes. However, although the CA/TIJ is an advancement in both poverty-wealth measurement and in promoting a humane path in economic development, by analysing a concrete process regarding child-malnutrition in Argentina, one can identify some unavoidable caveats regarding: (a) the democratic-relational dimension; (b) the practical side of TIJ; and (c) the agent-centred aspect. Quite a few questions arise from this analysis, but we can pose at least three:

- (a) from the *democratic-relational* perspective of justice, how are those who suffer from food insecurity and other basic struggles able to organise themselves so as to make their voices heard? (Narayan-*et al.*-2000). This is related to entitlement and the problems of a communicative process of justice;
- (b) even if poor people gradually increase their participatory attitudes and their public way of dialoguing becomes more equitable, a second unavoidable question regarding the *practical* dimension of justice ensues: how to reduce injustice without accounting for its causes? (Cardoso 1972). This is connected with interdependency and the problem of structural causes of injustice;
- (c) finally, from the *agent-centred* aspect of justice, how are poor agents, the community of the 'barrios', the Argentinean people and global society going to find the 'right thing to do' without knowing what *is* right? (Sandel 2009). This is linked with the nature of a good society, the relation between justice and good, and with individual and institutional virtues<sup>279</sup>, and with the problem of promoting justice while side-lining these issues.

Regarding (a) democratic-relational justice, Drèze and Sen have proved that individual entitlements in democratic regimes can prevent famine-prone situations by fostering a public and collective outcry demanding radical and immediate solutions. Malnutrition cases, however, have less immediate impact than famines and need difficult long-term solutions, often connected with 'issues of employment, health care, sanitation and economic growth' (ibid:15). Unhappily, what Sen calls 'food-entitlement' does not have the necessary influence in society to dramatically

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<sup>279</sup> Virtue ethics focuses on the questions: who are we?; who ought we to become?; and how do we get there? (Harrington and Keenan 2002: 23).

improve malnutrition cases. Besides, since TIJ 'public reasoning' is not reducible to democratic national formal frameworks, but rather includes all kinds of public discussion in the global process (TIJ:409), weaker voices seem to be more vulnerable than ever. Indeed, a 'dialogical global framework' ensuring equitability -regardless of the power of the voices involved- will be necessary so as to forge actual fruitful *dialogues* and not merely oppressive *monologues* from the *powerful*, often responded to by 'screaming' from the *powerless*. An idea of justice for global development should provide elements to foster this new 'dialogical framework', something TIJ seems to lack. Still, given the openness of the CA/TIJ, this dialogical framework could be found through the interaction with other theories.

On (b) practical justice, the German philosopher and theologian Johann Baptist Metz (2004), in his discussion with Jurgen Habermas, pointed out that practical reasoning, if it is to be critical, is necessarily constructed on memory (*anamnestic*). This means that the claim for public reasoning present in TIJ cannot omit the memory of oppression, which fosters the cry for freedom. Not only is this broadly accepted in critical thinking, but it also plays a fundamental role in any practical approach to reason and justice (see Cardoso 1972 and the 'dependentistas').<sup>280</sup> Indeed, as Metz explains, it is the basic narrative features of liberation that generate and enable critical consciousness. But in order to include this view, TIJ needs the interaction of other theories.

The third question (c) on agent-centred justice is related to the ontological concern about justice and the nature of a good society. To find a long-term solution to child malnutrition, something more than mere 'practical' discussions is required. Since development is a value-laden process (Alkire and Deneulin 2009b), public debate needs to face the problem of societal

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<sup>280</sup> 'Dependentistas' are supporters of the Dependency Theory, which argues that the underdevelopment of some countries is the result of perpetuated unequal commercial arrangements between the powerful and the poor nations, and to end the endemic dependency that generates underdevelopment, severe structural reforms are required in the globalised process, for which new development policies are needed (Conway and Heynen 2008:93). Although initiated by the analysis of Latin American countries and their dependency on the US and Europe, the theory was afterwards extended to other 'dominated' regions, i.e., Sub Saharan Africa and South East Asia. One of its mentors is the former Brazilian president, Fernando E. Cardoso (1972), for whom dependency and development are not incompatible, reason for which an idea of justice in development is crucial. He argues that in developing countries with great potential such as Brazil or India, it is the internal structural fragmentation that really generates dependency. This fragmentation is not exclusively caused by internal political-economic mishandlings, but rather by the global capitalist development trend, which puts some developed countries in the centre and some dependent countries on the peripheries of economics. 'Neo-dependentistas' such as Taylor (1996) and Ghosh (2001) have analysed the new dependency relationships, based more on technology, information and ecological uncertainty rather than on nation-states relations. Justice in development, for this theory, should aim at bringing all players to the centre, which is the only way of having 'fair play'.

objectives, for which subjective conversations and reasons are often insufficient. Can TIJ be feasible without a discussion<sup>281</sup> of what is right and good for individuals and society?

Sen's explanation of the good life is, consistent with his openness, too broad.<sup>282</sup> In principle, there is nothing wrong in arguing that somebody has a good life when she lives the life she has reason to value (TIJ:237).<sup>283</sup> But not all values are of the same nature. As Sandel (2009:8) explains when describing the aftermath of Hurricane Charley in Florida, some people had reason to value that price-rigging for new roofs was not unfair. They argued that without the extra economic motivation, the crisis would never be solved. Whilst this argument seems to be at odds with the common good, it is still 'reasonable' and needs to be discussed when taking social decisions about how to distribute 'the burdens of hard times' (ibid:12). Although Sen explicitly recognises this (TIJ:106), he again prefers to leave the discussion unresolved, trusting that by means of public reasoning people will find the best solutions available (TIJ:414). Yet, even in the neo-democratic public discussions, judgements about whether the peoples' values are fostering a 'good or more human' community are unavoidable. Further, public decisions do not guarantee 'good' decisions, as the history of democracy proves. To take an extremely controversial example, in the Germany of the post First World War period, democratic decisions, valued as good by the majority, ended in human atrocities (Arendt 2005). This means that an analysis of the 'nature' of values is required to pursue justice in a democratic way, something TIJ neglects.

Something similar occurs with the idea of human nature. Sen argues convincingly against a utilitarian vision of human beings, and in favour of considering each person as an end in herself, pivotal –for example- to policies concerning disabled people (TIJ:282). Thus, when applying justice to socio-economic development, Sen agrees with Nagel (1974) that the *idea of justice* is inextricably related to the nature of human beings (TIJ:414). However, Sen does not analyse such nature in depth. Due to his 'consequentialism' derived from a peculiar hermeneutics of Aristotle (Sanchez Garrido 2008), Sen avoids defining which actions are 'good' according to human nature before knowing their consequences. What Sen is suggesting, therefore, is to bypass the idea of 'the good', which can be universally applied to qualified personal/social actions. He stands by his belief that, through public discussions, humans can share their 'presumptions' about their nature and, therefore, find together the paths for having 'better' lives (TIJ:413). However, this is not

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<sup>281</sup> We will address this issue in Chapters 8 and 12.

<sup>282</sup> Robert Sugden (1993:1962) questions the practicality of Sen's view because of this: 'given the rich array of functionings that Sen takes to be relevant, given the extent of disagreement among reasonable people about the nature of a good life, and given the unresolved problem of how to value sets, it is natural to ask how far Sen's framework is operational'.

<sup>283</sup> See our interpretation of 'reason to value' in 6.2 (illustrated with the example of Gustavo) and 6.3.

necessarily true. Even the declaration of Human Rights (1948) is still contested by some groups, and the disagreements are based precisely on different anthropological conceptions (González-Carvajal 2005). Besides, Sen's interpretation of moral 'consequentialism' is not entirely convincing. With a different and thorough analysis of Aristotle, Thomas Aquinas has argued that the importance of considering the consequences of human actions and their particularities does not impede the analysis of the 'nature' of individual/social deeds. In fact, learning from the consequences of certain actions or policies is extremely useful to qualify them as 'good or bad' (*S.Theologica:I-IIae:qq.7-8*).

Far from being a pure metaphysical speculation, this debate is extremely important to the pursuit of justice in development policies. In our Argentinian example, it is necessary to explain why this unfair 'food insecurity' situation is socially unacceptable, something not apparent to everyone. Reasons focused exclusively on maximising social welfare will inevitably have a limited notion of human nature, as TIJ depicts (TIJ:282). Likewise, reasons focused only on individual capabilities may help, but are not enough to demonstrate if individual freedom is actually fostering social justice, nor to eradicate the causes of it. As Sen (2013:24) recently argued in the 2013 Human Development Report, poor quality public reasoning processes, typically ones in which people are not able to express 'what ails their lives and what injustices they want to remove', often lie behind unjust situations and 'the lack of opportunities people have to be or do valuable things'. However, the CA/TIJ does not offer *per se* a concrete way to address the obstacles which prevent people from being or doing what they have reason to value (thus freeing them from their suffering), apart from insisting on the need for public reasoning to remedy injustice. Hence, it would need input from other approaches to achieve its own goals of reducing injustices. In the malnutrition case, these allies of CA/TIJ should be able to further Sen's initiative, and address, for example, the structural causes that lie behind the situation, for which robust arguments about what a good society should be would be needed.

This does not mean that we need to ignore competing considerations of how Argentine society should be organised, nor that we need to agree on one 'transcendental' notion of a just society, as Rawls proposes. However, public discussions about development, even if they take the route of a comparative approach (TJI:180), cannot be limited to 'welfare and freedom', but they also comprise the question about *why* a community agrees that some people deserve to have a particular way of life and others do not, and *how* individuals can effectively help once communal decisions are taken (Sandel 2009:7). To answer those questions, matters regarding

human nature and individual/social behaviour should be examined. Given that TIJ does not provide a clear guide for this examination, we need assistance from 'beyond'.

In short, we find a common element in the analysis of TIJ's caveats. They could all be overcome with the assistance of other theories, and TIJ seems to be open enough to allow this interaction. For example, in order to respond to the difficulty of *democratic-relational* justice, in particular concerning the methodology of uneven public dialogue (e.g. how the voices of the persons lacking basic capabilities are going to be heard), TIJ could find helpful companions in Habermas's theory of communicative process (1984). With regard to the *practical* cause-dependent dimension of justice and its epistemological problem of institutional injustice (e.g. how to reduce practically an unjust situation without addressing in depth its cause?), TIJ could be furthered with the challenging arguments of the Dependency Theory of Ghosh (2001). In reference to the ontological concern about justice and the nature of a good society, even when the emphasis is on individual agents and their dialogical reasons (e.g. how the malnourished poor in Argentina are going to find the right thing to do without knowing what is right) TIJ may find an enriching partner in the virtue ethics approach.

Whether these interactions and partnerships can work in practice remains to be explored, something that goes beyond the scope of our research. Given that this dissertation aims at connecting the CA/TIJ with CST, our analysis is restricted to what CST may contribute regarding some of TIJ's caveats. In principle, due to its understanding of agents as 'persons-in-relation', CST seems "the" appropriate partner to contribute to TIJ in overcoming some aspects of the relational dimension of justice, something we discuss in Chapter 10-11. Moreover, given CST's notion of personal and structural sin, it can also enrich the socio-anthropological debate on the causes of injustices, as explained throughout Part III. Furthermore, considering CST's particular teleological view of justice, based on the eschatological presence of the Kingdom of God, it may enrich the analysis on the connection between justice and wellbeing, or 'the just' and 'the good', as examined in Chapter 12. Still, before exploring this concrete topic, and based on what we have explained so far, we need to confirm that the CA and CST are, scientifically speaking, potential interlocutors. Consequently, the next chapter analyses the basic agreements and disagreements between the two.



## 8. Basic agreements and controversies between CA and CST

In previous chapters we have given the main outlines of Sen's intellectual background, the chronological coordinates of his work, and the CA and TIJ. We concluded that Sen's views, both on capabilities and on justice, need the interaction of other theories to overcome their limitations and to succeed in promoting wellbeing and development. We asserted that CST is one of the possible theories that can help Sen's ideas ameliorate their limitations. In this concluding chapter we highlight the main points on which CST and Sen's approaches can explore a dialogue about development/freedom and wellbeing/justice. We will prioritise those topics in which both paradigms are certainly rivals, and those in which they are collaborative partners.

According to what we have seen so far, we can argue that the CA and CST contain converging and complementary arguments, summarised in Table II-8 below.<sup>284</sup> As the table describes, they can be *good interlocutors* of: (a) the bottom-up approach to both human development and justice; (b) the notion of freedom and relationality as the basis for a just development process; (c) the aim of development as people's wellbeing, which includes respect for particularities of different cultures and their values, and the universal aspiration for development, i.e. without exclusion. They can also have interesting discussions on the notion of justice as practical and as gradual (imperfect), given that for CST justice is a virtue (practical) that can never be practiced in total perfection (eschatology). They will also be able to engage in a friendly discussion about justice as a dialogical process, although for CST such a process is embedded in an ontological notion of the good and of nature that Sen is reluctant to admit. And they will have mutually enriching conversations about justice as relational, based on the fact that we are all inter-dependent, something which is particularly clear in the current globalisation process. This does not mean that Sen and CST have similar arguments, but that there is a common base on which their points can be mutually refined.

CA and CST are definitively *allies* against utilitarianism, libertarianism and any sort of political or economic authoritarian regime, as well as having a moral notion of human rights that transcends its legal dimension, and an ethical notion of economics that transcends its engineering/technical side. Moreover, they are allies in their efforts to provide a 'market' with a human face to society, and in approaching the globalisation process as an opportunity to increase the quality of life of all peoples, as well as in incorporating values and cultural beliefs into the public discourse. Furthermore, they are allies in the task of answering common questions, such

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<sup>284</sup> Please note that in the chart the differences are marked *red and italic*

as whether the cultural rootedness of development –i.e. respect for particular cultural values–, hinders or fosters human wellbeing.

**Table II-8: Comparison between CA/TIJ and CST main ideas on Development and Justice**

CA		CST
<b>(a) Starting point (Bottom-up approach): the poor &amp; injustices</b>		
Those who suffer injustice in the real world (not abstract vision of a just society)		Preferential option for the poor Reality (see-judge-act)
<b>(b) Basis for development &amp; justice: Freedom &amp; Relationality</b>		
Capabilities (enhancing capabilities) <i>Emphasis on the individual</i>		Human Dignity (cultivating freedom from sin) <i>Emphasis on personalism and social responsibility</i>
Agency & participation (relational emphasis)		Relationality: person-in-relation, agency, the <i>common good &amp; sin</i>
<b>(c) The aim: Human Flourishing &amp; Universal Development</b>		
Wellbeing	<i>Cultural rootedness in tension with universality</i>	Meaningful life (transcendent entity)
Human development for all		Catholicity/Universality
Values and cultural beliefs		Values/cultural/ <i>religious beliefs</i>
<b>(d) + Justice</b>		
Practical		Virtue (practical)
Gradual		Gradual
Imperfect		Eschatological (never in total perfection)
Democratic/ dialogical process		Dialogical ( <i>still ontological</i> )
Inter-dependence		Inter-dependence
<i>Gender justice</i>		<i>Equality men-women</i>

Table II-8 (continuation)		
CA		CST
(e) Common enemies		
<i>Consequentialism</i>	Utilitarianism	<i>Teleologism</i>
<i>Secular reasoning</i> <i>(not vs faith)</i>	Libertarianism	<i>Reason + Faith</i>
	Authoritarian regimes	
Human rights (grounded on shared humanity)		Human rights (grounded on human dignity)
(f) Economics		
	Market with a moral face	
	Globalisation process as a positive alternative to isolation and/or dependency	
	Linked with human rights (HR as moral injunction, not just legal mandates)	

However, CST and CA diverge, and one could say they are ‘rivals’, regarding their emphasis on relationality<sup>285</sup> and on individuality respectively, and a teleological conception of the human good and social order, which Sen, and most Anglo-Saxon political philosophy, resists. They also have competing views on ethical matters: while Sen is a consequentialist, CST follows a teleological Aristotelian-Thomistic approach.<sup>286</sup> In addition, Sen’s optimism regarding the potential of reason fails to delve deep into the notion of sin or human failure, which CST highlights, and might collide with the CST integrated vision between reason *and* faith. Moreover, Sen’s strong emphasis and serious studies on the gender dimension of justice seems to clash with CST’s general considerations on the role of women as agents of development.<sup>287</sup>

<sup>285</sup> For CST, the promotion and safeguarding of human dignity can only be done as a community (CSDC:145).

<sup>286</sup> See our explanation on the intersection between Sen’s consequentialism and CST Thomistic approach to ethics in 5.1.2, where Sen’s consequentialism, grounded in the story of Arjuna, seems compatible with Thomism; and 7.3, where we explain that a different interpretation of Aristotle, based on Thomas Aquinas, permits CST to include and go beyond the consequences of an action for its moral evaluation.

<sup>287</sup> Although CST documents stress the equal dignity of all persons, because ‘God shows no partiality’ (Acts 10:34), since ‘we are all creatures made in his image and likeness’ (*Compendium*, 144), it also argues that male and female equality is not a ‘static’ one, and that their ontological peculiarities are developed through the relation between each other (ibid:146). The interpretation of official CST of these relationships is highly contested by Catholic

Still, this eventual ‘rivalry’, could help both approaches to enrich rather than to knock each other down, as explained in Part I and depicted in the *The Boxers* painting. First, given that both CST and CA have a “bottom-up” and inter-disciplinary approach, which starts with the experience of outrageous injustices that moves us to act (*Parable of the Good Samaritan*), they could find a common basis on which to build a constructive dialogue. For instance, regarding “relationality”, they do not need to start discussing which kind of ontological relations humans have, but rather how relations that are manifestly unjust can be improved. While CST’s ecumenical “seeing” would accept the CA economic vision, the latter would accept CST views due to its notion of “soft secularism”, for which religious ideas and values on human progress are never sidelined.<sup>288</sup> This acceptance may in itself help CST to improve its notion of secularism, occasionally negative, and hence widen its scope of dialogue.

Moreover, when discussing how to discern the oppressive relations that hinder development/freedom and wellbeing/justice, CA can contribute with its nuanced explanation of how “freedom” operates, which may help CST refine its own vision of liberty. CST, for its part, can bring its ideas on human flourishing, furthering the CA with some religious views held by billions of people, many of whom are in developing countries where those unjust relationships are patent. Also, CA can certainly contribute by giving a framework to measure those unjust scenarios, normally related to poverty. This is crucial for offering concrete tools to decision-makers on how to respond to those situations and amend their causes. On the other hand, CST can bring on board some of its teleological conceptions of the good, which may help in finding the path to the best solutions.<sup>289</sup> For the sake of the dialogue, this contribution cannot be made in a dogmatic manner, but rather in the way Sen has learned from Tagore and the Hindu tradition, i.e. moving persuasive storytelling based on religious beliefs, which CST can find in the Parables of the New Testament (see Part III). Finally, CA insistence on gender justice, particularly rooted in the notion of human equality, may incentivise CST to refine Catholic teaching on the role of women in international development and amplify its notion of women’s agency and the

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feminism (see Beattie 2006), and would also be questioned by CA. Moreover, CA would challenge the exclusion of women’s agency and participation in the reasoning process in the formulation of CST documents. These important issues are beyond the scope of this thesis.

<sup>288</sup> This particular topic is explored in Chapters 10-11. While Chapter 10 analyses how CST anthropological notion of ‘person-in-relation’ is somehow present in the CA, Chapter 11 studies the parable of *The Unmerciful Servant*, where unjust relations in economics are depicted, but where the logic of gratuitousness, championed by CST, proves helpful to further CA ideas on free agency and dialogical participation.

<sup>289</sup> This is further analysed in Chapter 12, when addressing the parable of *The Workers in the Vineyard*. We argue that justice, in this parable, basis for CST idea of justice, is introduced as wellbeing. In other words, doing justice cannot be severed from doing good to others.

need for their full participation in the reasoning process which contributes to the formation of CST.

Furthermore, when continuing discussion on how to improve our capacity to be related to each other, particularly in how to “act” according to the unjust relationships observed and discussed, neither the CA nor CST have concrete ideas. The CA, based on a capability-centred idea of justice or *nyaya*, which is practical, relational and agent-focused, acknowledges that to act justly is a continual process by which individuals and societies improve their standard of living and the way of being. Given that this is forged through public reasoning processes, a premeditated response to injustices is inconceivable. Similarly, CST perceives ‘justice’ as a personal and social virtue through which we constantly deploy our aspirations to live together (in community), by respecting each other and by bringing about good to all, hence expanding the Kingdom of God on earth.<sup>290</sup> But the way in which such a Kingdom of justice could be spread needs the participation of believers who, living in their respective societies, and in partnership with believers from other religions, non-believers and secular-technical people, can ideate a better and more just way of being related to each other. Hence, either from the CA and from CST, the interaction between each other is not just possible in terms of justice, but is necessary if such ideas of justice are to find concrete solutions to present problems.

This general vision of how the CA and CST could dialogue needs further elaboration. As the Hindu mural in the introduction to this Part II illustrates, these kinds of dialogues need certain frameworks that can allow the conversation to advance, for which different colours (voices and topics) need to be considered in the scene. How to frame the dialogue between CA and CST, and which of the topics described in Table II-8 can we select, is the objective of Part III.

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<sup>290</sup> For more on the notion of justice according to the Kingdom of God, see Part III, especially Chapter 12. For a classical account of Catholic notion of justice, see Thomas Aquinas, *Summa Theologica*, II-II, q.58. For a concise modern vision of CST idea of justice, which comprises an effort to describe the social question from the vantage point of the poor (CST methodological starting point), the reflection based on Biblical revelation (CST methodological second point: ‘in the light of the Gospel’), the emphasis on structural causes of injustice (structural sin and its connection with the common good), the need for going beyond personal conversion and work in the promotion of justice (mission of all disciples of Christ), and the reality of ‘injustices’ as a call to action (CST methodological third point), see the statement of the Synod of Bishops (1971), *Iustitia in Mundo*. It is worth pointing out that this statement emerged from a consensus of bishops worldwide, which generates an additional interest as a CST document, particularly after the emphasis on collegiality given by Pope Francis in *Evangelii Gaudium* (2013). For an exhaustive analysis of *Iustitia in Mundo*, see Himes (2005).

## Part III: CA and CST in dialogue

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### Introduction: *Diálogo y Alborozo*

As the painting *The Boxers* by Roberto Matta and the *Delhi Mural* by Jijja Shri have helped us to introduce and synthesize Parts I and II respectively, *Diálogo y Alborozo*, by Luis Seoane,<sup>292</sup> will do likewise in this third and last part of the Thesis.

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<sup>291</sup> Picture 3: Luis Seoane: *Diálogo y Alborozo* (1970). This oil on canvas painting is part of the permanent collection of the Museo de Bellas Artes da Coruña (nbr 4828; dimension: 146x114 cm). Available from: <http://museobelasartescoruna.xunta.es/index.php?id=393&idc=7207> Accessed on 01/07/2013.

The foreground of the painting presents two persons sitting down, with peaceful though thoughtful expressions, in what seems to be a friendly discussion. The author introduces a resemblance between these two figures by painting them with similar colours, suggesting they have basic grounds upon which they can build up a fruitful dialogue. As Aristotle (*Nicomachean Ethics*, Book IX) argues, one characteristic of an emerging friendship is to have certain experiences in common or similar tastes or passions for something. However, the contrasting way in which same colours are used to paint both figures, as well as a slight dissimilarity in colours (the violet-blue of the left figure is not used on the right), may imply that the characters have different views. This could be confirmed by the dissimilar lines with which their heads are drawn. Moreover, the two persons might be representing different genders (the figure on the right being the woman). In this case, the similarities of colour could well symbolise the equality of dignity. Whatever the difference between the two persons, the truth is that their discussion occurs on the same ground, at the same level, without any sign of aggression or imposition.

The background of the painting (the two figures above) expresses the delightfulness of the characters (arms up as an expression of joy), probably coming from the conversation itself. Note the way the two delightful characters (above) are positioned in relation to the two dialogical figures (below): the delight seems to be like the fruit of the tree. There are black lines that go upwards, from the larger conversational figures below, and then expand horizontally within the joyful smaller figures above, like a tree or a plant emerging from the ground. The pair of tranquil figures below are surrounded by 'green', suggesting grass (or earth and/or peace in modern art), while the pair of euphoric figures above are emerging from the 'green' towards the 'orange', the colour of life in post-impressionist art.<sup>293</sup> Furthermore, the rejoicing characters are coloured differently from the dialogical ones, probably symbolising the newness proper to any fruit, in this case the fruit of a dialogue.

According to our free interpretation of the painting, we can conclude that true dialogue, where similarities and dissimilarities are taken seriously into account, and where mutual respect abounds (same level), yields unalloyed joy and a colourful novelty of life. This is precisely what

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<sup>292</sup> The author is an Argentine-Spanish (Gallego) (1910-1979) whose work has been influenced by German impressionism and by Picasso. The colours, contrasts and composition of his paintings have evolved according to his personal-social experience. His art is full of social topical issues, such as the role of women in society, or the crucial place of dialogue in order to promote peace and justice. For more on Seoane see: <http://boveriJuanCarlosPintores.blogspot.co.uk/search/label/seoane%20luis>

<sup>293</sup> Attributing a specific function to each colour can be highly contestable, particularly due to the many nuances of the effects colours have on people (see Mottram 2006 and Hardin 1988). However, we rely here on Wassily Kandinsky (1977) theory of colours and spirituality, for which orange-red brought nearer to humanity by yellow-, suggests ideas of joy and plenty.

we intend in this Part III: not a boxing match,<sup>294</sup> but rather a friendly dialogue between the CA and CST, based upon some similarities, enriched with dissimilarities. The dialogue is also proposed at the same level, where one cannot dismiss the other because of one's further level of expertise in economics or theology respectively. This is expected to generate new fruit, a novel way of analysing socio-economic issues upon which original policies can be promoted.

In addition to illustrating the rationale of this Part III, the painting also aids us to frame it. Firstly, after introducing the parables of the Kingdom of God as the theological vehicle with which CST can propose a dialogue with CA, the *Parable of the Seed* takes us to the grass-roots level of human flourishing. As *Diálogo y Alborozo* depicts the two characters surrounded by green, so the *Parable of the Seed* will help us to depict a corresponding background to the dialogue between CA and CST. It is about how the word (seed) is accepted, in what earthly context it is received (culture), and what the relational bases are that permit the bearing of fruit. Secondly, as the growing tree in the painting helps us to imagine a fruitful continuity of the dialogue between the two characters, the *Parable of the Unmerciful Servant* leads us to further the notion of development as freedom envisioned by CA and CST. Thirdly, as the painting suggests a joyful outcome of the dialogue, in the *Parable of the Workers in the Vineyard* we are faced with a wider idea of justice that arises from the exchange between CST and CA, an idea that can bring joy to many because, if applied in economics and politics in countries such as Argentina, it could enhance an inclusive wellbeing.

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<sup>294</sup> We used the boxing-match image in Part I to suggest that eventual contenders, such as CA and CST, can still play in the same ring (methodology). Moreover, as suggested by the painting *The Boxers* illustrated in Part I, we argued that the eventual opposition between social theology and economics was more like a gentle discussion rather than a strong argument. This Part II develops such discussion.



## 9. Framing the dialogue with parables of the New Testament

Part I explained that CST and the CA are methodologically compatible, clearing the ground for a potential dialogue between them. Part II, after analysing the CA in depth, highlighted those topics on which it resonates with CST, as well as those on which they may dissent. As argued in the ecumenical report *From Conflict to Communion* (2013),<sup>295</sup> any dialogue, if it is to be truly fruitful, needs to start with what the interlocutors have in common. From such sharing, disagreements will ensue without hindering the advancement of the conversation. However, in order to explore a dialogue around the concurrent topics, we need a framework.

### 9.1. The parables: counter-arguing prevailing utilitarian narratives

How to frame the dialogue between CST and CA is a question without a single answer. Considering that we are proposing the dialogue from the CST side, we would like to offer the framing assistance of religious stories with an economic content, this means, some parables from the New Testament related to the Kingdom of God. Are we not preventing the dialogue from happening with this proposal? Why are these stories relevant for promoting the dialogue between CST and CA?

*First*, because these stories, as explained before,<sup>296</sup> deal with perennial dilemmas of human social existence, such as issues of ‘power’ or ‘oppression’, generally linked to economic systems. Thus, the principles contained in the stories can be easily understood and applied by non-believers seeking solutions to such social conundrums. This is, for example, the case of Amartya Sen (TIJ:170-173) using the *Parable of the Good Samaritan* (Lk 10:25-27) to illustrate how justice includes values such as responsibility towards strangers, which he then connects with enhancing freedom and agency in a global context.<sup>297</sup> As Sen uses ancient Sanskrit religious stories with economic implications to explain the meaning of wealth and freedom, he also uses an ancient Christian parable to address matters of justice. Hence, the use of parables from the New Testament is not something foreign for the CA.<sup>298</sup>

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<sup>295</sup> The report is based on the vast experience of the dialogues that have been held between The Lutheran World Federation (LWF) and The Pontifical Council for Promoting Christian Unity (PCPCU) in the past decades. Both interlocutors seek at common agreements between the two historically divided churches.

<sup>296</sup> See 3.2.3.

<sup>297</sup> See 2.1.

<sup>298</sup> For Dodd (1961:21), one of the main functions of the parables of the Kingdom of God is to ‘entice the hearer to a judgment upon the situation depicted’, and then challenges the listener, ‘directly or by implication, to apply that judgment to the matter in hand’. This position, emphasised by many scholars, including Söding (2009), is pivotal to link these stories with what Sen calls ‘reasons to value’.

*Secondly*, the parables can act as mediators between social principles included in the Bible, and social problems existing in societies, particularly those with a Christian background, such as in Latin America, which is the contextual focus of this study and where a number of economic policies relating to the CA are applied. Because these stories have helped Christian communities throughout history to read the signs of their times, especially the hard ones, and to discover unknown hermeneutical horizons for their problems, they are fundamental historical testimonies that can help find future semantic innovations in our economic-ridden era (Verstaeten 2005).

Similarly, and *thirdly*, due to the role these stories have as ‘great art’ or ‘classics’,<sup>299</sup> which transcends the limitations of historical or geographical contexts (Janzen 1973, Schneiders 1991), they can help readers to discover ‘a word of possibility’, this means, they can inspire them (i.e. CST and CA) to find new ways of being and acting, particularly wanting in present global economics.<sup>300</sup> As the economists Akerlof and Shiller<sup>301</sup> (2009:ix) argue, ‘human-interest stories that give vitality and emotional resonance to economic views drive animal spirits’ (i.e. economic agents). Moreover, ‘stories people tell are also stories about how the economy behaves’ (ibid.:x). Therefore, if we want to drive our economy towards a more humane and just society, stories with economic content seem to be essential. In other words, if we are ‘to reinvent our capitalist economy’ (ibid.:viii), we need stories that trigger renewed human motivation for business, stories that can counter the prevailing narrative about ‘tough’ business or development, or about the need to exacerbate ‘greed’ and mercilessness in order to be successful. These motivational narratives are required not merely for economic agents, but also for policy-makers and leaders in general, because ‘great leaders are first and foremost creators of stories’ (ibid.:51). Although it is true that economists and policy-makers tend to be sceptical about too many stories, particularly because quantitative facts and statistics are pivotal for any economic programme, it is also true

<sup>299</sup> See 3.2.3, where we explain how biblical texts inspire visually, audibly and dramatically a new way of interpreting the sign of the times.

<sup>300</sup> Pope Francis has supported this line of argument. Following the Latin American Bishops’ document *Aparecida* (2007:n.360), he avows that the Gospel offers readers a chance to live life on a higher plane, not merely due to its religious content, but also because it is a source of authentic personal fulfilment. Its freshness opens up new paths of creativity with which to respond to new social problems, enabling seekers of justice to discover new meanings of the events and words of today’s world (*Evangelii Gaudium*, 10-11.22). More specifically, Francis insists that *religious classics* texts or teachings have power ‘to open new horizons, to stimulate thought, to expand the mind and the heart’ (n.256). Overlooking them just because they arose in a context of religious belief is a mistake. Firstly, because it prevents society from being enriched by the profound humanistic values contained in such biblical texts. Secondly, because it assumes that Christian faith is incompatible with reason. However, ‘albeit tinged with religious symbols and teachings’, classic biblical texts have also ‘a certain value for reason’ (ibid.). Dismissing them in the name of reason, as normally occurs, is not only a contradiction in terms, but worse, it hinders the dialogue between faith and science, between development and people’s beliefs (nn.238-243), between eventual approaches that are ‘precious allies in the commitment of defending human dignity, in building peaceful coexistence... and in protecting creation’ (n.257).

<sup>301</sup> Robert Shiller is one of the few economists predicting the financial crisis of 2008. He won the Nobel Prize for economics in 2013.

that stories themselves move markets and instil confidence in individuals, groups, companies and nations (ibid.:54-55). Put differently, narratives that can stimulate agents and transform our economy are the basis for policies that aim at fostering a new economic system which enhances the freedom of everyone and aspires to dramatically redress present unjust situations.

In short, these Biblical parables can be taken as ‘great-classic-art’ through which the prevailing root-metaphors in economics, occasionally distorting human freedom and wellbeing, can be seriously challenged. What is more, the parables offer CST and CA the chance to find, in their challenging and inspiring narratives, ideas to redress the unjust state of affairs and to create innovative policy-programmes for the betterment of society. Although this will be particularly true in societies where the majority is Christian, due to its universal approach to human meaning (*Sollicitudo*, 54), it could be applied elsewhere too. Still, in order to apply it to the dialogue between CST and CA, we need to ensure that their dialogical frame is anthropologically enhancing and economically compatible with the CA, and theologically valid for CST.

## 9.2. The parables and the CA

We are aware that the language of “the kingdom of God” could be problematic for a dialogue with secular partners. For this reason, we consider it appropriate to clarify why this notion is not necessarily religiously exclusive, and why the content of the parables fits with the CA anthropology.

There is no doubt about the importance the “Kingdom of God” has for the rationale of the mission of Christians regarding their fight against underdevelopment, oppression, ill-being and injustice (Mt 25:40; GS,27; *Compendium*,50-55). Yet, are the ideas of human development/liberation and wellbeing/justice associated with the Kingdom of God confined exclusively to Christian belief? In order to answer this question, we need to clarify what this Kingdom is all about. If it was a particular socio-political arrangement which God revealed to Christians so as to imbue them with the authority to impose that “good and divine” reality over the rest, then it would hardly be possible to connect CST with CA or with any other approach to economic development. Conversely, if the Kingdom of God is a revelation about values with which to tackle human injustices, then this revelation is open for interaction with different approaches –even non-religious ones- dealing with similar issues.

To give a clear and neat academic or theological response to the question about the Kingdom of God would imply misinterpreting Jesus’ message altogether. He himself does not offer a concise definition of the Kingdom. He sees the Kingdom of God as something “coming”,

meaning something that is already happening, more as a work-in-progress than as something already definitively configured; more as a dynamic action than as a static *picture*. Ergo, when explaining the Kingdom, Jesus does not say ‘the Kingdom is here or there, or is this or it is not that’, but rather ‘the Kingdom is coming’, and ‘is like a sower who went out to sow...’ (Mk 4:1-20), ‘like a mustard seed which, when sown...’ (Mk 4:31-32). He uses parables, comparisons, metaphors, stories based on life experiences in order to describe what this Kingdom looks like.<sup>302</sup> Due to the openness of this story-telling approach, some secular authors, such as Sen (TIJ:17-173), use parables to illustrate and further their socio-political-economic views.

Moreover, the general content of the parables is related to an understanding of humanity that can shed new light on any anthropological research, thus not restricted only to Christian doctrine. First, they introduce ordinary human situations with which people can identify. Those situations are neither ‘bad’ nor ‘good’ *per se*, but rather are ambiguous and complex, which, as Söding (2009) argues, strengthen the credibility of the parables. For example, while individuals are presented as part of arbitrary systems, such as slavery or abusive labour conditions, they do not suggest a Hobbesian view of ‘brutish’ humanity. Conversely, they underline the goodness of human liberty and responsibility, as a vehicle to change those unfair systems. Second, while the parables stress the importance of material things, they imply that this cannot be the main parameter of human flourishing. Third, while they describe the existence of different social statuses, they connect the status to what people actually *are*, and to their sentiments of shame and pride, necessarily fostering a comparison between groups, and posing the question of equality. All these anthropological views are closely connected with Sen’s CA, where a special understanding of positive freedom, values that go beyond ‘the material’, the importance of sentiments that influence people’s rationality, and the comparison between groups, are all crucial for a comprehensive notion of human progress, hence for development policies too.<sup>303</sup>

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<sup>302</sup> Although Jesus seems to move freely among different communicational styles in order to talk about the Kingdom of God (e.g. brief proclamations or *kerygma*, beatitudes, eschatological prophesies, prayers, conditions to get into it, etc.), the parables occupy a fundamental place (Söding 2009). The variety of styles Jesus uses correspond to a fundamental characteristic of the Kingdom, i.e. the response to human realities in order to improve them, which requires an adaptation of the message according to particular situations or audiences. What is at stake is always a message that needs a response (ibid.). Hence, everyone needs to be able to receive the message, as implied in the *Parable of the Sower* (see Chapter 10).

<sup>303</sup> Sen in fact finishes *The Idea of Justice* with a reference to Hobbes description of the dire state of human life: ‘nasty, brutish and short’ (TIJ:415). For Sen, human development, wellbeing and justice can be different from this if, as Hobbes also points out, we can escape from ‘isolation’ or ‘solitude’ and help those suffering from deprivation. Coincidentally, CST defines poverty as isolation, and proposes that in order to tackle it, an anthropology of reciprocity, solidarity and gratuitousness needs to be taken on board by political-economic programmes (cf. *Caritas-in-Veritate*, 57), as discussed in the following chapters.

Yet, the parables add two anthropological issues which we do not find in Sen. First, feelings such as fear of failure or uncertainty about the future can lead us to choose certain values that do not necessarily correspond to our faith or to our ethical reasoning. Hence, personal or structural failures (or sins) are pivotal when addressing human flourishing. Second, although human choices need to be somehow accountable if we aim to reduce social injustices and promote individual development -as Sen would argue-, such choices do not fully determine our fate or our way of flourishing. Indeed, as the parables suggest, a novel understanding and deployment of 'accountability'<sup>304</sup> can generate unpredicted views with which to redress unjust situations and forge social bonds. Openness to the newness of the Kingdom is never hampered by misleading human choices. But this openness does not come out of the blue, as if it were a divine magical imposition that bypasses human reason. The openness of the Kingdom is usually revealed through unexpected changes in the way people relate to each other, such as forgiveness. Therefore, it is still inextricably connected with human nature and to what Sen calls 'reasons to value', because people opt for such changes in behaviour as they usually ameliorate the situation in human conflicts and foster more just relationships. They are humanly reasonable, although they do not belong to a utilitarian reasoning.

The parables of the Kingdom, in this sense, present a twofold view of human beings. On the one hand, humans are described realistically, with their own personal and social ambiguity and capacity to fail (Söding 2009). This 'seeing', that corresponds to reality, is however not the last human truth. Precisely due to the irruption of the Kingdom on earth, which fosters liberation and triggers freedom, humans can transform or reform such reality for the betterment of their wellbeing through creative relationships. When people deploy the values of the Kingdom in their ordinary lives, they spread its novelty while embarking on social bonds comprising a deep humane vision of justice.

To synthesise, the parables provide a basis for a humane understanding of development/freedom and wellbeing/justice. Like Sen's CA, the parables: (i) present the reality of human development as ambivalent, still not "Hobbeseanly brutish", due to their view of positive freedom; (ii) give importance to the material dimension of economic life, although they show this dimension cannot be the only one nor the prevailing one; (iii) recognise different human statuses, yet do not grant them a universal natural validity. On the contrary, they are

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<sup>304</sup> Not surprisingly, Sen's recent book, written with Drèze (2013), gives cardinal importance to the topic of "accountability" (pp. 81-106), which was somehow wanting in his previous publications. This opens a new window for the dialogue between CA and CST: the need for a deep eco-theological study of "accountability". Sadly, we cannot include it in this particular research, but it will certainly be a topic of post-doctoral investigations.

dramatically presented so as to highlight the need for a comparative approach, and to provoke, in the listeners, the motivation for change.

In addition to this socio-economic coincidence with the CA, the parables provide a wider anthropological view: (i) they remind us that sentiments such as fear, uncertainty, desperation or greed, can seriously influence our personal and public reasoning, and that personal and structural sins cannot be omitted from the equation of wellbeing; (ii) relying on the relational dimension of humanity, a dimension that includes but transcends utilitarian choices, the parables emphasise the feasibility of transformation, particularly in socio-economic relations; and (iii) they provide the required creative incentive for such transformation. They do it through inspirational and deeply anthropologically-rooted stories, which depict the conversion that takes place when the newness of the Kingdom of God is included in relationships.

Nevertheless, to move from theological and anthropological inspiration to actual economic transformative programmes, an interaction between theology and economics is needed. As argued before, neither the CA nor CST and the parables can offer both inspirational and concrete economic programmes to improve peoples' wellbeing on its own. It is the combination of the two which opens up such a possibility.<sup>305</sup> For this reason, and before entering into such a combination, we need first to ensure the use of the parables is theologically valid for CST.

### 9.3. The parables and CST

The Kingdom of God, as depicted by Jesus in the parables, contains the basis of Catholic social tradition. From a theological perspective, as explained in Part I,<sup>306</sup> the social teaching of the Church before Vatican II was fundamentally based on the natural law tradition, mediated through patristic and scholastic theology. Although we can find some attempts to evoke scriptural texts in the pre-Vatican II social encyclicals, the use of scriptures was not the overriding theological pattern (Donahue 2005). Given that Fathers at the Council stated that the Bible is the heart and soul of theology (*Dei Verbum*, 24), and that consequently theological research and teaching 'should draw more fully on the teaching of Holy Scripture' (*Optatum Totius*, 16), post Vatican-II

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<sup>305</sup> As mentioned in the Introduction of this thesis and in the Introduction of Part III, we are not proposing a 'boxing match' approach, i.e. CST vs CA (cf. *The Boxers*), but a gentle and friendly dialogue between them, starting from the common features of both to enable them to generate socio-economic change (cf *Diálogo y Alborozo*).

<sup>306</sup> See Chapter 2.3.2. We are conscious that, as Donahue (2005:11) avows, 'an adequate presentation of the relation and relevance of biblical thought to CST would itself involve a multivolume work'. Due to limitations of space, we cannot address this internal theological discussion here. For more see Appendix 3.

social documents ventured into a new use of Scriptures, shifting from a 'proof texting' use of the Bible towards 'inter-textual reference'.<sup>307</sup>

Although CST official documents often evoke texts quoted by preceding documents, they do so in association with actualised hermeneutical approaches, thus connecting those biblical references to other scriptural texts, thus opening a new horizon on the interpretation of the Bible when applying it to social concerns (Donahue 2005:11). In addition, and more importantly, current CST attempts to incorporate the living and lively interpretation of the texts by Christian communities. Although this is clearly apparent in local CST (e.g. the Latin American case<sup>308</sup>), it is less clear in the universal social documents (ibid.). However, and due to the election of a Latin American Pope, it is expected that the universal social teaching will tend to move towards the Latin American use of the Scriptures and its strong connection with present social realities. Present CST stress on the Scriptural basis rather than on natural law in order to approach socio-theological concerns is the line this thesis follows.<sup>309</sup>

Nevertheless, we ought to be aware of the limitations of using biblical texts to address complex socio-economic situations.<sup>310</sup> As the moral theologian James Gustafson (1975) has argued, the Holy Scriptures do not provide a pristine morality, but reveal the reality of God and human beings. By so doing, the Bible stresses that, if we accept the message of liberation and salvation contained in the Scriptures, we can become different persons altogether (Häring 1978). As the *Parable of the Sower* implies, the reception of the biblical message can aid our development and enhance our wellbeing. If this is true, i.e. if Scripture really can help in forming our character, then a social interpretation of virtue ethics is a good theological accompaniment to Bible studies. But while virtue ethics offers a philosophical explanation of human development and wellbeing, the Bible narratives, in particular the parables of the Kingdom, foster critical appraisal of real situations and buttress enough creativity to imagine a different *status quo*, occasionally lacking not only in the theology of virtue ethics, but also in secular approaches to human development.

Therefore, although confined to only some elements of social ethics (i.e. freedom-development and justice-wellbeing), this Part III relies on the challenging but creative thought-

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<sup>307</sup> For a wider, though concise explanation, see Schneiders (1997).

<sup>308</sup> See the particular cases of *Puebla* (1979) and *Aparecida* (2009).

<sup>309</sup> We are not trying to diminish the importance of the natural law approach, which has been immensely helpful for the dialogue between theology and social sciences. For the impact natural law has had on CST till John Paul II, see the excellent analysis of Stephen Pope (2005). Still, what we are trying to explain is the CST option to move, gradually and prudently, towards a more biblical basis, which opens new horizons for reading the sign of the times and for dialoguing, for instance, with economic partners.

<sup>310</sup> See 3.2.

provoking parables of the Kingdom, which are not only ‘anthropo-economically’ compatible with the CA, but also theologically congruent with CST.

#### 9.4. Criteria for the selection of the parables

A first criterion for the selection is their subject matter. We find in the Gospels different types of parables that refer to the Kingdom.<sup>311</sup> These can be classified according to the topic (Söding 2009), such as parables about:

- (i) the growth and fertility of the kingdom -also known as the parables of a new beginning (e.g. *The Mustard Seed* –Mk 4:30-32 and cc., *The Leaven* –Mt 13:33 and cc., *The Seed Growing Secretly* –Mk 4:26-29, *The Sower* –Mk 4:3-8 and cc);
- (ii) discipleship and the construction of the kingdom (*The Two Builders* -Mt 7:24-27/Lk 6:47-49, *The Good Samaritan* -Lk 10:25-37, *The Workers in the Vineyard* -Mt 20:1-6- and *The Tower Builder and the Warring King* -Lk 14:28-32);
- (iii) Israel and the receiving of the Kingdom (*The Barren Fig Tree* -Lk 13:6-9, *The Two Sons* -Mt 21:28-32, *The Wicked Tenants* -Mt 21:33-46, Mk 12:1-12 and Lk 20:9-19);
- (iv) ‘lostness’ and the ‘grace-full’ inclusiveness of the Kingdom (*The Lost Sheep*, *Coin and Sons* Lk 15 and Mt 18:12-4);
- (v) money and human development in the Kingdom (*The Rich Fool* –Lk 12:16-21, *The Unjust Steward* -Lk 16:1-13, *The Rich Man and Lazarus* -Lk 16:19-31);
- (vi) accountability and responsibility in the Kingdom (*The Unforgiving Servant* Mt 18:23-35, *The Two Debtors* -Lk 7:41-43);
- (vii) the future of the eternal Kingdom (eschatology) (*The Net* –Mt 13:47-50; *The Ten Virgins* –Mt 25:1-13; *The Talents* –Mt 25:14-30 /Lk 19:11-27; *The Sheep and The Goats* –Mt 25:31-46).<sup>312</sup>

<sup>311</sup> The evangelists do not provide a classification of the parables, but it is a useful tool offered by exegetes which aids us in understanding their characteristics and functions (Snodgrass 2008:9).

<sup>312</sup> Alternatively, the parables can be classified based on the way they utilise comparisons. If we follow the Hultgren’s (2000:3) definition of the parables: ‘a figure of speech in which a comparison is made between God’s Kingdom, actions, or expectations and something in this world, real or imagined’, then we can identify two types of parables. The first one are ‘narratives’, because the comparison includes a narration; the second group are ‘similitudes’, because the comparisons are made, without a story, by means of words such as ‘is like...’ or ‘is as if...’. Hultgren identifies thirty-eight units in the synoptic Gospels that correspond to this genre of comparison (ibid.:3-4). Another possibility, among many, is to classify the parables according to their literary genre (Snodgrass 2008:576-7), such as parables of confrontation (e.g. *The Rich Man and The Poor Lazarus* –Lk 16:19-



As reflected in their titles, many of these stories have an economic content. However, due to limitations of space, we cannot address them all. Among the above-mentioned groups, the first one occupies a special place (Söding 2009), epitomised by the *Parable of The Sower*, which contains a fundamental theological notion of the Kingdom of God that underpins CST, and provides a relational anthropological view upon which CST and CA can cement their dialogue. In addition, due to the need of present economics to explore deep anthropological narratives (Sen 1988, North 1993, Olstrom 2010, Akerlof and Shiller 2009), this parable is also selected for its vision of a responsorial and relational model of human development, which can be fruitfully connected with Sen's ideas on development and flourishing and with CST's vision of IAD.<sup>313</sup>

Given that the prevailing meta-narratives for the promotion of economic growth are still utilitarian, and considering that utilitarianism is a common enemy for CST and CA, we have selected a parable from which alternative narratives for present economic development can ensue. Due to the stress on the relation between profit and actual growth of the *Parable of the Unmerciful Servant* (Mt 18: 23-35), we argue that it can help frame the discussion on *development as freedom*, which needs to transcend mere utility-functions. Likewise, considering that the metaphors underpinning current economic policies and business are rooted primarily in a notion of 'tough-retributive-justice', the parable of *The Workers in the Vineyard* (Mt 20:1-16) has been selected to aid in framing the dialogue for an *idea of justice as wellbeing*, for which other notions of justice and a vision of a good society play a pivotal role too.

A second criterion for selection is their structure matter. From a structural point of view, apart from the introductory parable of *The Sower*, the rest of the texts, thanks to their long narratives, give us the opportunity to study not just the content of the parable and its related topic (e.g. development/freedom or wellbeing/justice), but also the process through which the novelty of the parable is developed, both through the interaction among the characters and between the text and the readers. From a theological point of view, the parables introduce a view of God whose power, justice and goodness contrast with the prevailing economic and religious notions of the times on those issues. For example, in the parable of *The Workers*, God's justice is not introduced as mere "retribution", nor is his power presented in a fatalistic way, as if it could not go beyond human choices (Söding 2009). Hence, the parable is open to new ideas of justice, and Sen's TIJ could be a good one with which to converse.

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31.), juridical parables (e.g. *The Two Debtors* -Lk 7:41-43- and *The Two Sons* -Mt 21:28-32), parables of discovery (e.g. *The Treasure* -Mt 13:44), parables of the feast (e.g. *Prodigal Son* -Lk 15:11-32 or *The Wedding Feast* -Mt 22:1-4), or parables of nativity or fertility -also known as the parables of a new beginning (e.g. *The Mustard Seed* -Mk 4:30-32 and cc., *The Leaven* -Mt 13:33 and cc., *The Seed Growing Secretly* -Mk 4:26-29, *The Sower* -Mk 4:3-8 and cc).

<sup>313</sup>For an explanation of IAD, see Introduction-(i) of this Thesis.

A third criterion is to present a balanced biblical view of the Kingdom of God according to the three synoptic evangelists. Firstly, one parable from Mark (*The Sower* 4:1-20) frames the idea of the Kingdom and links it to human development. Secondly, a parable from Matthew (*The Unmerciful Servant* 18:22-35) addresses the nature of economic relations and freedom. Finally, another parable from Matthew (*The Workers in the Vineyard* 20:1-16) presents the connection between wellbeing and justice. These complement the vision of a parable from Luke (*The Good Samaritan* 10:25-37), previously analysed in Chapter 2.1.<sup>314</sup> The analysis of the selected parables by no means presents a detailed biblical examination of the texts, nor does it specify the vast history of the reception of the texts, a task that deserves a doctorate in its own right.<sup>315</sup> What it does attempt, however, is to introduce a view of development-freedom and wellbeing-justice from the novelty of the Kingdom, a view that can mutually be complemented with Sen's ideas, hence aiding CST and CA to advance in their dialogue.

## 9.5. Method to analyse the parables

In order to analyse the parables selected, we will apply two different methods which correspond to two sets of parables.<sup>316</sup> The first one is used to analyse the *Parable of the Sower*, which, as mentioned before, provides us with the structure on which to build up a dialogue with Sen's ideas on development and justice. Texts are interpreted with the help of modern historical-critical exegesis and theology, interpretation we then apply to our topic on development/freedom and wellbeing/justice.<sup>317</sup>

The second method is a narrative one, and will be applied to the parables where stories and dialogues around economic relations are described. Originated by Paul Ricoeur (1976) and mediated by biblical scholars such as Schneiders (1991), Lee (2002) and Söding (2009), it consists of three basic steps. First, 'we begin to read the text naively, opening ourselves to its dynamic in the same way that children listen to stories' (Lee 2002:6). This means that we will give special consideration to the dynamism of the stories and the characters involved. We will try also to

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<sup>314</sup> Mark, Luke and Matthew are known as the 'synoptic' evangelists, because they have a similar point of view on the reality of the Kingdom of God and Christ, which differs from that of John (Brown 1997). By analysing one parable from each of the synoptic evangelists, we aim to introduce a comprehensive notion of the Kingdom.

<sup>315</sup> In order to address this topic fully, our selection would also need to include other parables, such as *The Crafty Steward* (Lk 16:1-12), *The Rich Man and the Poor Lazarus* (Lk 16:19-31), or *The Murderous Tenants* (Mk 12:1-12), and at least introduce a brief history of the reception of the parables, both from a theological and pastoral point of view.

<sup>316</sup> For a comprehensive analysis of different methods to interpret the Bible according to Catholic theology, see Pontifical Bible Commission (1994). For more about the interpretation of the parables of the Kingdom, see Blomberg (1990; 1994), Snodgrass (2004), and Brosend (2006).

<sup>317</sup> Given that this thesis is not a Biblical one, exegetical studies are not developed in full, but just taken as tools with which to advance hermeneutics of the texts.

paraphrase the parable by including the first reactions of listeners or readers to the text. The second moment, according to Ricoeur (1976), requires distancing oneself from the text while incorporating reliable exegesis and trying to discover the intention of the original author in context. For Schneiders (1991), this second naïveté or distancing movement can be described as actual ‘criticism’, because by distancing oneself from the text, one can discover the intrinsic power it has. But this distance prepares one also for the third and final step, because the already enriched interpretation of the text can be meshed with the reader/listener’s view, generating a whole new hermeneutical horizon. Indeed, the third step consists in going back to the text once personal concerns or experiences have been applied to the thoroughly analysed script.<sup>318</sup> For Söding (2009), it is only then that the ‘novelty’ of the texts of the Kingdom of God can shine and produce a substantial impact on the listener/reader, and thus on CST and CA.

On a more theological note, this method is also useful for our analysis because it guards against abusing the images of relationships the parables present on the one hand, and permits more accurate identification of the image of God behind the story on the other.<sup>319</sup> Indeed, through these stories Jesus communicates creatively the mystery of God and humankind. But, occasionally, the images he uses are disconcerting, as in the image of the King of *The Unmerciful Servant* (Mt 18:22-35), initially merciful and then cruel.<sup>320</sup> Although the texts need not be curtailed or ‘domesticated’ by theological principles or ideologies (Snodgrass 2000), cultural, political and economic assumptions of the parables need actualisation or explanation to modern listeners if they are to produce the intended effect: to open people’s eyes to reality while offering a framework with which to re-evaluate their behaviour and their being. This is precisely the aim of the following Chapters.

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<sup>318</sup> This is perhaps an over-simplification of the triple-step method. Please refer to the cited authors for a full analysis of it.

<sup>319</sup> The abuse of the images of the parables on God and on relationships was highly criticised by German biblical scholars such as Adolf Julicher (1889/1963) and Linnemann (1966). Their criticism provoked a serious hermeneutical debate on the validity of allegorising the texts of the parables (Snodgrass 2000).

<sup>320</sup> See our detailed explanation in Chapter 3.

## 10. Integral human flourishing: *The Parable of the Sower*

Chapter 9 gave an account of the New Testament parables used here to frame the dialogue between CST and CA. The parables serve not only as an antidote to the prevailing utilitarian narratives in economics, a goal both CST and CA aim towards, but they also provide an anthropological platform on which both interlocutors can discuss and enrich their positions on development/freedom and wellbeing/justice.

After introducing the text of *The Sower* (Mk 4:1-20), this chapter firstly questions whether the new life the Kingdom of God brings is, theologically speaking, an open door to a notion of human flourishing not incongruous with the CA. Secondly, the theology of ‘integral and authentic development’ (IAD) deriving from the Biblical notion of human flourishing is explained. Given that such an idea is based on an anthropological conception of the person as an individual-in-relation, the Chapter also addresses why such an understanding of human relationality can cultivate a better view of development/freedom and wellbeing/justice. Finally, the chapter explores the connection of the parable with the CA and its eventual impact on economics. After elucidating why the CA cannot be severed from a relational anthropological model of development, the last section of the chapter argues that neither the CA nor CST on their own can efficiently foster economic policies based on our essential relationality. However, a dialogue between CST and the CA, based on and framed by the parable of *The Sower*, can trigger creative ideas on how to fruitfully pursue such a goal. By analysing the CST notion of ‘personal reciprocity’ through the CA ideas of free agency and processes of participation, we conclude that the CST-CA alliance is a strong alternative to utilitarian narratives of economic growth, and that it can provide a basis for processes of social dialogue with which to forge actual development, thus improving economics too.

The parable of *The Sower* epitomises the coming and the dynamism of the Kingdom. This is not just because it is one of the first parables in the Gospel of Mark - the first Gospel to be written (Hultgren 2000, Brown 1997)-, but most importantly, because of its content.<sup>321</sup> This parable opens the door to the reality of the Kingdom (Söding 2009, Snodgrass 2008), always

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<sup>321</sup> The parable is also found in the Gospels of Matthew (13:3-23) and Luke (8:5-15). While this presence in the three Synoptists confirms the importance of the parable for Jesus’ preaching, which authenticity is rarely questioned (one of the few exceptions is Carlston 1975:146-148), it also carries the exegetical weight of comparisons and differences (Snodgrass 2008:150-154). But in Mark, the parable has a special connotation. According to bible scholar Mary Ann Tolbert (1989:121-122), *The Sower* opens the first main division of the Gospel (Chaper 10), while another parable, *The Wicked Tenants* (Chapter 12), opens the second main section. These two parables, the argument continues, summarize a ‘Markan’ twofold image of Jesus as the sower of the word, and as the heir of the vineyard. For a similar argument see Boucher (1977). Given that Matthew and Luke follow Mark, we have selected the latter for analysis.

relating the gift of the earth and the work of human hands, to the gift of the word of God and the interaction with listeners,<sup>322</sup> to a dynamism that is always fertile and generates new life. For this reason, failing to grasp the meaning this parable would prevent the listener from a true comprehension of the rest of the parables and of the Kingdom of God altogether (Mk 4:13). Let us take a look at the text:

<sup>1</sup> Again he began to teach them by the lakeside, but such a huge crowd gathered round him that he got into a boat on the water and sat there. The whole crowd were at the lakeside on land. <sup>2</sup> He taught them many things in parables, and in the course of his teaching he said to them, <sup>3</sup> 'Listen! Imagine a sower going out to sow. <sup>4</sup> Now it happened that, as he sowed, some of the seed fell on the edge of the path, and the birds came and ate it up. <sup>5</sup> Some seed fell on rocky ground where it found little soil and at once sprang up, because there was no depth of earth; <sup>6</sup> and when the sun came up it was scorched and, not having any roots, it withered away. <sup>7</sup> Some seed fell into thorns, and the thorns grew up and choked it, and it produced no crop. <sup>8</sup> And some seeds fell into rich soil, grew tall and strong, and produced a good crop; the yield was thirty, sixty, even a hundredfold.' <sup>9</sup> And he said, 'Anyone who has ears for listening should listen!' <sup>10</sup> When he was alone, the Twelve, together with the others who formed his company, asked what the parables meant. <sup>11</sup> He told them, 'To you is granted the secret of the kingdom of God, but to those who are outside everything comes in parables, <sup>12</sup> so that they may look and look, but never perceive; listen and listen, but never understand; to avoid changing their ways and being healed.' <sup>13</sup> He said to them, 'Do you not understand this parable? Then how will you understand any of the parables? <sup>14</sup> What the sower is sowing is the word. <sup>15</sup> Those on the edge of the path where the word is sown are people who have no sooner heard it than Satan at once comes and carries away the word that was sown in them. <sup>16</sup> Similarly, those who are sown on patches of rock are people who, when first they hear the word, welcome it at once with joy. <sup>17</sup> But they have no root deep down and do not last; should some trial come, or some persecution on account of the word, at once they fall away. <sup>18</sup> Then there are others who are sown in thorns. These have heard the word, <sup>19</sup> but the worries of the world, the lure of riches and all the other passions come in to choke the word, and so it produces nothing. <sup>20</sup> And there are those who have been sown in rich soil; they hear the word and accept it and yield a harvest, thirty and sixty and a hundredfold.'

The parable has a threefold structure: (i) introduction (vv.1-2) and the story itself (vv.3-9); (ii) the disciples' question on the meaning of the parable (v.10); and (iii) Jesus' twofold response:

<sup>322</sup> In all the three Evangelists, but particularly in Mark, the dominant idea of the parable is *hearing* and seeing: the verb ἀκούω (*akouoo*: hear) appears thirteen times (see France 2002). This is a methodological coincidence with the parables of the Old Testament (e.g. Jdg 9:7; Is 28:23; Ez 20:27) and with CST method for analyzing social reality (see Part I). For Snodgrass (2008), Wright (1996) and Garnet (1983), the parable is a kind of midrash on Isaiah 6:9-10 in relation to how people hear and respond to God's message.

about the mystery (secret) of the Kingdom and the parables in general, and about the meaning of the parable of *The Sower* in particular (vv.11-20).<sup>323</sup>

With regard to the story, it comes as no surprise that ‘the watershed of the parables’ of the Kingdom of God relies on the image of seeds, sowing, failure of crops and fruitful harvests (Farrar Capon 2002:54). In the Greco-Roman world, such images were commonly used as metaphors to describe actual life, that means, the difficulties of human existence, with its misfortunes and prosperity, with its instructions on how to live well and the inevitable sanctions of ignoring those instructions –or judgments in theological terms (Snodgrass 2008:155). The biblical image of the seed, therefore, is intimately linked with what we call development and wellbeing, pivotal for this research.

Yet, the parable in itself (vv.3-9) is obscure, and raises more questions than clarifications regarding human growth. Jesus launches this story about farming without any prelude. Although some listeners may relate this story to human growth, Jesus does not give any precise indication about the message transcending agriculture (Farrar Capon 2002:57-58). No wonder the disciples request clarification (v.10). But before responding to the question in particular, Jesus addresses the disciples about parables in general (vv.11-12). According to the great majority of bible scholars, the reason being, that with this parable Jesus sets the frame for the understanding of the rest of the parables of the New Testament (Snodgrass 2008:145). In other words, through the parable of *The Sower*, Jesus introduces a series of stories about a new topic in his preaching, where he describes a new dimension of his mission of bringing the Kingdom of God to earth, and in a novel way (Söding 2009). Although Jesus has already positioned himself as a messianic figure before the disciples (Mk 1:34; 3:12), due to the novelty of his message, he suspects that his hearers might recognise any kind of Messiah and kingdom other than his (Farrar Capon 2002:51). Hence, in order to confirm that what follows (the explanation of the parable, vv.13-20) is a fundamental prophetic and messianic message, he recalls the mandate of God to the prophet Isaiah (6:9),<sup>324</sup> who was sent to people who *look but do not perceive, or listen but do not understand* (vv.11-12). Nonetheless, as Farrar Capon (2002:59) points out, this first explanation

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<sup>323</sup> For a further explanation of the structure of this parable, see Farrar Capon (2002:54-74), Luz (2001:228-251), and Snodgrass (2008:156-175). Bible scholars disagree about the structure, not so much about the three steps described hereinabove, but rather on how the parable is related to the rest of the Gospel. Disagreements also abound regarding the interpretation of the parable, particularly on whether the focus is on the sower, or the soil, or the seed, or the harvest. More theological discussions have occurred around the primordial meaning of the parable. While some stress on the eschatological element, others do so on the ecclesiological, and others on the social one. Addressing these discussions exceeds the scope of our research. For both the structure and the content of the parable, we rely on exegetical and hermeneutical studies, particularly on Snodgrass (2008), Söding (2009) and Farrar Capon (2002). These authors’ explanations illustrate some of the basis of CST regarding development/freedom and wellbeing/justice.

<sup>324</sup> “Go, and say to this people, ‘Listen and listen, but never understand! Look and look, but never perceive!’”

of Jesus is even more confusing than the initial obscure story. Is the “secret” (or mystery, or revelation<sup>325</sup>) of the Kingdom granted only to Jesus’ disciples? Does Jesus want to prevent his listeners from understanding the secrets of human flourishing unless they become disciples? Is this the reason why he speaks about the seed of life in mysterious parables, so as to confuse listeners outside the inner circle of followers?

For the British bible scholar Dodd (1961:15), who pioneered the modern analysis of the parables of the Kingdom, the idea of Jesus desiring his teaching to be unintelligible ‘cannot be made credible on any reasonable reading of the Gospels’. Yet, discussions about this topic, theologically known as the ‘messianic mystery’, abound.<sup>326</sup> Although we cannot address it fully here, a brief explanation is needed in terms of the universality of the message of the parables, and of *The Sower* too. If Jesus wants to reinforce the privilege of the disciples, who seem to know the mystery of the Kingdom of God, and to emphasise the distinction between them and the rest, then a Christian proposal of human development requires a sectarian approach. Only Christians would be able to receive the seed of the Kingdom, hence to flourish to the full. Subsequently, the final explanation of the parable (vv. 13-20), when referring to the unproductive land, would be alluding to those who reject the message of Jesus, while the fertile land would be indicating the Christian community. Hence, rather than ‘universal’, this is about a ‘Christian growth’. Although this argument may coincide with the fundamental importance the parable gives to *listening* to the word of the Kingdom incarnated in Jesus Christ, it does not match with the message of the universal kingdom deriving from either this or other parables of the Gospel, for which the βασιλεία τοῦ θεοῦ<sup>327</sup> has already come to the world, to all, irrespective of the peoples’ response (Mk 4:11; Mt 12:28; Lk 10:9-11) (Dodd 1961:37). Indeed, the new life of the Kingdom is not limited to the exclusive group of followers. Reasons for this are threefold.

Firstly, as Snodgrass (2008:157) points out, the verses about the ‘mystery or secret’ of the Kingdom (vv. 11-12), where Jesus essays a first general explanation of the parables, have the intention to propose a revelation of the Kingdom, not to hide it: ‘nothing is hidden except that it should be made clear; that is, nothing is placed in parables except in order to reveal’ (ibid.). The parables, thus, have the aim of bringing light to the reality of the Kingdom of God and human

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<sup>325</sup> Although the above translation (New Jerusalem Bible), translates μυστήριον (*mysterion*) (v.11) as ‘secret’, many scholars agree that a more accurate word would be ‘mystery’, which differs from what is obscure, but rather relates to the idea of ‘revelation’, at least in Semitic language (see Ferrar Capon 2002:58).

<sup>326</sup> See, for example, Schweitzer (1950), Wrede (1971) Blevins (1981), Kingsbury (1983), Tuckett (1983) and Räisänen (1990).

<sup>327</sup> ‘The Kingdom of God’, in Aramaic *malkuth*. ‘Like other substantives of the same formation, is properly an abstract noun, meaning “kingship”, “kingly rule”, “reign or sovereignty”’ (Dodd 1961:29). Therefore, the whole idea of the kingdom has not to be associated with a particular place or land, nor with a specific political regime, but rather with actual human life, including the political-economic one, where God is already present.

flourishing, but they do so through stories of ordinary life. Because these stories are as ambiguous as actual life itself, listeners can somehow identify with certain elements of the parable. Therefore, as explained before,<sup>328</sup> the parables provide an inclusive and credible way of describing human flourishing and its struggles (e.g. failures or sins), and offer the path to finding the required motivation with which to actually develop the full potential of human beings. Nothing in the parables following *The Sower* suggests that Jesus is forging a sectarian approach (Ferrar Capon 2002). Moreover, based on the structure of the chapter where the parable of *The Sower* is located in Mark,<sup>329</sup> and on its literary technique,<sup>330</sup> the story of the parable arguably reveals that, in the Kingdom of God, those who are outside are not 'the crowds' (4:1), who were symbolically gathered around Jesus to hear his word, but rather his brothers (3:31-35), who represent 'those who should have responded and did not' (cf 6:1-6) (Snodgrass 2008:157). Thus, Jesus' paraphrasing the prophet Isaiah sounds more like a warning to the disciples, who are around him and will become the leaders of the New Israel, than an exclusion to non-Christians.

Secondly, Jesus' invitation *to listen* (4:3) resonates with the communicational role of the prophets of the Old Testament, i.e. to bring the word of God to be listened to, particularly regarding things that people would not like to hear, such as stories of injustice or false ideas of development. Because these injustices are often suffered by people who are excluded from religious, political or economic systems, what the prophetic message of the Old Testament usually attempts is to trigger an inclusive view of society where such injustices and exclusions can be diminished, if not abolished. Jesus starts his parabolic messages aligning himself within this prophetic claim (Ferrar Capon 2002). But given that Jesus, as opposed to the prophets, has brought the awaited Kingdom of God to earth, he needs to emphasize the role of those who have already received the 'mystery' (v.11), i.e. his disciples, who are to spread the revealed word into the world.<sup>331</sup> Also, and most importantly, Jesus needs to stress that he talks in parables to those 'outside', because it is precisely the appropriate communication to foster actual human advancement in those who are not familiar with the Jewish religious message. The parable of *The Sower*, therefore, is an attempt to enlighten and instruct about human growth and the seed of

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<sup>328</sup> See Part Chapter 9.

<sup>329</sup> Mk 4 has a seven-part chiasmus: (a) vv.1-2: narrative introduction; (b) vv.3-9: a seed parable (the sower); (c) vv.10-12: general statement on the purpose of the parables; (d) vv.13-20: interpretation of the parable; (c') vv.21-25: general statements applied to parables; (b') vv.26-32: two seed parables; (a') vv.33-34: narrative conclusion of the use of parables (Snodgrass 2008:157-157).

<sup>330</sup> 'Mark uses the technique of *intercalation*; that is, he *brackets* a section before and after with material that provides help in understanding.' (Snodgrass 2008:157). Brackets of this section emphasis the following themes: (i) Jesus' true family (3:31-35); (ii) those who are *outside* (4:10-12); and (iii) those who hear and response, or insiders (4:10-12; 21-25).

<sup>331</sup> This is arguably one of the reasons 'the sower' is not identified with God, neither in the story nor in its explanation (Snodgrass 2008), as mentioned above.



good life. But this enlightenment is not so much for Jesus' followers, but rather for those who are not part of such an exclusive circle. Hence, it is not theologically irresponsible to suggest that the content of the parable should be connected with the reality of individuals and communities beyond Christianity.<sup>332</sup>

Thirdly, despite the title of the parable, which comes from the Gospel of Matthew and not from the original Mark (Snodgrass 2008:169),<sup>333</sup> the main focus of the story is not on 'the sower', who is never identified by any of the Evangelists. Rather, the main focus is 'the soil' and its receptivity and conditions to produce fruit, a topic on which the parable contains an extensive explanation. In fact, one may wonder why there is no mention of other perils to growth, such as drought or disease, or even the limitation of some seeds to produce fruit. The reason being, that, in this story, a poor or a rich harvest depends entirely on the land's fertility, on its capacity to receive the seed of life with which, if properly cultivated, will be enabled to produce abundant fruit.<sup>334</sup> Translating the metaphor, the parable is not focused on the exclusivity of belonging to a particular creed, but on the ability of humans to develop a life to the full.

Put differently, if the seed of the Word of life is sown in *the earth*, without distinguishing between parcels or ownership, it implies that the new vitality of the Kingdom emanating from such seed<sup>335</sup> is *for all* those who inhabit the earth. What the parable is introducing, thus, is a series of stories of the Kingdom of God where the emphasis is on its universality, not on its exclusivity to a particular group. Indeed, the attitude of being open, half-open or closed to the renovating life of the Kingdom (seed) and to the possibility of human flourishing applies without distinction to the 'large crowd' (v.1) of humanity. Besides, as the growth of the seed depends on the interaction with all kinds of soils and their particularities, so too does the growth of the new life in the Kingdom, which relies on the interaction and relationships between all kinds of peoples and their particular cultures and 'reigns' (terrains). The fact that the Kingdom of God is interwoven with other earthly kingdoms, and that its expansion depends on such interweaving, offers everyone the possibility to receive and incorporate into their lives the values of the

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<sup>332</sup> Accepting or rejecting Christ's message of the Kingdom of God comprises all sorts of forms and nuances. Due to the theology of 'incarnation', in which Christ assumes all humanity, it is possible to reject the message and not bear fruit, even by being an insider, while it is also feasible to accept the seed of growth being an outsider.

<sup>333</sup> For Hagner (1993:379), the title does not refer to the main topic of the story, but to the opening words. This was the usual way of identifying passages in ancient world, and it is still the way CST encyclicals are titled. Even in Matthew, according to Hagner, the parable does not have a Christological indication. For a different position about the Christological role of the parable, see Painter (1997:78).

<sup>334</sup> Some scholars refer to the innate dependency of the seed on the soil (see Liebenberg 2001:358-361).

<sup>335</sup> If neither the seed nor the sower are specifically identified by the Evangelists, not even in the long explanation they provide of the parable (e.g. Mk 4:13-20), it is reasonable to relate both of them with the new reality the parable is introducing: the Kingdom of God (Tolbert 1989; Snodgrass 2008; Söding 2009).

Kingdom, so as to flourish. But given that those values need the soil to produce actual fruit,<sup>336</sup> the outcome of the values of the Kingdom would depend on the different soils in which the seed is sown. The fruits of the Kingdom, hence, could not be pre-determined. The production of different fruits will depend on the different types of soil, and the way the soil relates to the environment.

In short, the parable neither suggests an imposition of a particular religious view, nor an economic system that could foster human flourishing, but rather offers a nutritious open approach with which people can develop their human potential. This view is echoed by the CST proposal of being a social thought with universal aspirations, i.e. not a social proposition for Catholics only, not merely for Christians, but rather for all humankind (*Compendium*, 83-4), the reason for which many social encyclicals are addressed to all people of good will (e.g. *Populorum Progressio*, *Sollicitudo Rei Socialis*, *Centesimus Annus*). This Kingdom of God's openness, illustrated in the parable as a 'fertile' dynamism of inter-dependency and relationships from which novel ways of living on earth can ensue, is part of what is theologically known as 'the newness of the Kingdom'.<sup>337</sup> As opposed to a dogmatic imposition from heaven above, it is a gradual and practical development from earth below. Further explanation of this 'newness' may help to disclose the idea underpinning CST's notion of freedom and justice, which any interlocutor with CST would be interested in hearing,<sup>338</sup> even if it is to counter-argue.

### 10.1. The newness of the Kingdom of God<sup>339</sup>: open door to human flourishing

Jesus introduces the Kingdom of God as a new ἀρχή<sup>340</sup> or beginning (Mk 1,1). As Söding (2009) highlights, the novelty [καινότης] of life<sup>341</sup> (Rm 6:4) this kingdom brings comes from the

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<sup>336</sup> According to exegetical studies, the hundredfold size of the yield is not an exaggerated one, which would have signified a miracle or an over emphasis on the eschatological harvest. The parable rather implies a bountiful harvest, not only because estimations of normal yields in ancient Palestine indicate it was physically possible (McIver 1994; Jeremias 1972), but also because it echoes the theological blessing to Isaac's field (Gn 26:12) (Snodgrass 2008:155). Therefore, if the abundant harvest describes a physical possibility of development, the image of the parable is connected with a new life that exists here on earth, not with the final renewed life at the end of time (ibid.). In other words, the parable stresses the importance of the Kingdom of God operating on earth, which permits human advancement, and not so much the eschatological dimension of life.

<sup>337</sup> See Chapters 3 and 9.2.

<sup>338</sup> As mentioned previously while commenting on the need to listen and understand an interlocutor in order to have a fruitful dialogue (see Part I/Introduction and Part III/Introduction), and as Sen also argues regarding the need for public reasoning processes to promote justice (see Chapter 7.1), CST proposition of development and justice, based on the notion of the Kingdom of God, is essentially dialogical (see Chapter 3).

<sup>339</sup> I am indebted to Dr Gerardo Söding for his insightful thoughts on this matter.

<sup>340</sup> See *Thayer's Greek Lexicon*, Biblosoft (2011).

<sup>341</sup> The novelty of the Kingdom has been analysed by different theologians from different angles. However, as Söding (2009) points out, these few studies do not develop a systematic research on the novelty of the Kingdom

Spirit of Jesus and his Father (Rm 7:6), which renews [ἀνακαινοῦν] humanity from inside (2Co 4:16), generating new human beings (Col 3:10; Ef 2:15; 4:24), inaugurating [ἐγκαίνιζεν] a new covenant (Hb 9:18; 12:24; Lk 22,20; 1Co 11,25; 2Co 3,6; Hb 8,8.13; 9,15) and proposing new paths for living (Hb 10:20) and a new commandment of love (Jn 13:34; 1Jn 2:7.8; 2Jn 5).<sup>342</sup> The new [νέος] covenant is symbolised as new wine (Mt 9:17; Mk 2:22; Lk 5:37.38.39); it is a *relational life* symbolised with new [καινός] yeast and new dough (1Co 5:6-8) or new fruit (Mt 26:29; Mk 14:25). This new life-wine cannot be put into old wineskins, but needs rather to be put into new [καινός] ones (Mt 9:17; Mk 2:22; Lk 5:38), which means that it requires a renovated way of personal lifestyle and social organisation. For Christians, such renovation is linked with the coming of the Kingdom of God.<sup>343</sup>

The new realm of the Kingdom<sup>344</sup> has been inaugurated (Hb 9,18; 10,20) by the force of the Spirit (cf. Mt 12:28), through Christ's presence, words and deeds. But this reality is taken a step further -to its fulfilment- when Jesus reveals the love of his Abba (Mk 14:36) through his passion and resurrection. However, this fulfilment is not an end, but a new origin for humanity, a new creation. From then on, divine love can ensue from our human condition, particularly through our failures and struggles. The fruit of the paschal mystery is the Holy Spirit of God, whose strength can renew human beings (2Co 4:16 and Col 3:10) and the face of the earth. Still, this divine Spirit needs human reception, the required reciprocity for the yielding of any new way of existence. As the earth needs the seed in order to flourish, human flourishing needs the seed of

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as such. Doré (1982) analyses the novelty of the Christian message within philosophy, exegesis and theology. Prümm (1939) discusses the novelty of the new Church in a pagan socio-historical context. Harrisville (1955), Hoch (1955) and more recently Grilli (2007), examine the novelty within the New Testament. Moltmann (1965) and Jüngel (1960) address the novelty of Christian theology as a whole. Hattrup (1988) researches the newness of the Kingdom within history. Söding (2009) argues that, either from fundamental theology or from biblical studies, the novelty of the kingdom is worth exploring, especially when trying to promote the values of the Kingdom in non-Christian cultures, or when attempting to dialogue with other beliefs but without diluting the radical Christian message or accommodating its teachings to the audience.

<sup>342</sup> Nor indeed, can the new life be sewn into old cloth, because its newness does not match and could tear or ruin the old fabric (Mc 2:21; Lc 5:36). Those participating in the newness of the kingdom are like new [καινός] creatures (2Co 5:17; Gal 6:15), able to speak new languages (Mc 16:17), to sing new songs (Rev 5:9; 14:3), to have new doctrines (Mc 1:27; Acts 17:19.21), to inhabit new cities (Rev 21:1-2) -whether on earth or in heaven (Rev 21:1-2; 2Pe 3:13)-, because everything can be renewed by the one who rules this kingdom (Rev 21:5).

<sup>343</sup> For Pieries (2013), the renovation comes from a dialogue 'of equals' between God and humanity, and a dialogue 'of equals' between humans themselves.

<sup>344</sup> We are aware of the debate on the tension between the "new" and the "old" testament, and on the "new" and the "old" teachings within Catholic tradition. Which hermeneutic is more appropriate? Pope Benedict XVI would argue in favour of a hermeneutic of continuity, whereas others would support a hermeneutic of disruption, or a dialectical one (see for example, O'Malley et al 2007 and Dulles 2003). For Söding (2009), however, the dynamism of the kingdom comprehends a paschal process, in which the "old" is assumed, incorporated, but nevertheless transformed into something "new". However interesting, this discussion exceeds the scope of the present research. We have opted to follow Söding's criteria.

the Spirit so as to blossom (cf. Mk 4:20).<sup>345</sup> Later in this chapter, we shall suggest how this can be further enriched with reference to Trinitarian relationality.

Human development, in this sense, is conceived in the biblical parables, particularly in that of *The Sower*, as a “responsorial” mystery in which God is giving the Spirit of newness and creativity to humanity, and humanity receives it. The outcome of this giving and receiving is the expansion of the new realm instituted by Jesus and continued by the work of the Spirit of God. This realm permits people to flourish, to enhance their capacities to the full. Despite being originated by the Holy Spirit, the Kingdom is not merely “spiritual”, in the pious sense of the word, but rather rooted in the earth, comprising the environment and human work.<sup>346</sup> The spiritual kingdom, in this sense, is inextricably linked with the worldly kingdom. On the one hand, the Kingdom of God, in order to blossom on earth, depends somehow on human activities underpinned by the values of the Kingdom. On the other hand, such activities and values can lead to actual human and integral development. Consequently, the question about the Kingdom of God is necessarily connected with the question of human flourishing.<sup>347</sup>

## 10.2. The parable and CST: integral and relational development

Following the analogy of the seed and the earth described in the parable, human flourishing is related to the quality of the earth,<sup>348</sup> to the climate and environment, and to the other forms of

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<sup>345</sup> Given that this Spirit of growth and novel transformation does not blow around “inside” the Church only, nor is it limited to explicit believers (cf. Jn 3:8; *Lumen Gentium* 16; *Gaudium et Spes* 22.92; *Ad Gentes* 4.9.11.15; *Redemptor Hominis* 6), it gives believers hope and enthusiasm to work with all human beings for the flourishing of humanity and for the conversion of unjust situations worldwide.

<sup>346</sup> According to Dodd (1961:20), the language used by Jesus to describe the Kingdom of God is ‘intrinsically like the process of nature and of the daily life of men’. In other words, the supernatural reality of the Kingdom can be found in the natural life. Because of this connection between both orders, any dimension of natural life can illuminate the dimension of God’s reality, and vice-versa. This is distinctively presented when Jesus calls to ‘consider the fowls of the air... (Mk 4:26-30; Lk 12:24-28), or when he suggests that ‘the falling of rain is a religious thing, for it is God who makes the rain to fall on the just and the unjust’, or when he claims that ‘the death of a sparrow can be contemplated without despairing of the goodness of nature, because the bird is not forgotten by [the] Father,’ or when he presents the love of God ‘in the natural affection of a father for his scapegrace son’ (Dodd 1961:20-21). For Dodd, ‘this sense of divines of the natural order is the major premise of all the parables’ (ibid.:21), reason for which the sphere belonging to ‘the spirit’ and that belonging to ‘the world’ are inextricably meshed. We can see how the language of the parables and the idea of the Kingdom of God coincide with the theological principle of ‘incarnation’, for which God, in Jesus Christ, assumes human nature to the full (cf. Jn 1:14; Phil. 2:5-8), a belief confirmed in the 4<sup>th</sup> century by the Nicene creed. For a brief definition and main features of this principle, see *Catechism of the Catholic Church*, 456-483. For the relation between the principle of the incarnation and the parable of *The Sower*, see Ferrar Capon (2008:59-61).

<sup>347</sup> CST documents confirm this biblical view that the newness of the Kingdom is inextricably related to human progress (see *Compendium*, 53).

<sup>348</sup> As depicted by the parable, the quality of the earth differs from one piece of land to another. This difference is worth noting when addressing social inequality. Indeed, for CST, social equality differs from mathematical equality. Still, all humans are called to, and are capable of, flourishing and bearing fruit, whether thirty, sixty, or a hundred fold.

life. The seed depends on these factors in order to be and to progress, or in Sen's CA language, to 'be and do'. In other words, seeking for human development is a task that cannot avoid the question on how we relate to 'the earth' and how we organise communal life so as to flourish. Therefore, human flourishing is not just a matter of individuals seeking their own benefit, but rather aiming at their own actual good, which includes their natural surroundings.

Given that this kind of flourishing is impossible to achieve in isolation, the communal dimension of humans is crucial for development. It comes as no surprise, then, that the parable identifies the seed with the Word of God, whereas the soil is the potential of humans to flourish. The soil, indeed, is not described individually, as isolated plots. It is the communal or relational response to the seed that permits people to actually develop.

This relational anthropology, which derives from a dialogical understanding of the mystery of God and humanity, has been developed in Catholic theology throughout centuries, but has been particularly taken as a cornerstone of CST during the last century to challenge what, arguably, are partial (or denaturalised) influential anthropologies. With regard to economic systems, CST's relational anthropology usually clashes with other two: (i) the liberal-individualistic approach, for which the flourishing of the individual, his freedom and self-interest is what really counts; and (ii) the communitarian-autocratic approach, for which the general common-interest shall always prevail over self-interest in order to achieve a reasonable level of social justice, even if this entails serious restrictions upon individual freedom (Figuerola-Deck 2005 and Borobio 1995).<sup>349</sup>

For CST, however, an integral vision of human flourishing cannot blight individual freedom, if the aim is human flourishing, something also stressed by the CA. Still, neither can a comprehensive view of human flourishing belittle the essentially communal dimension of humanity. Although CST has been occasionally labelled as 'the third way', i.e. an alternative to both liberalism and communism, the truth is that it has never positioned itself like that; its goal has never been to offer a concrete economic system (cf. *Sollicitudo*, 41).<sup>350</sup> What CST does intend however, is to redress some imbalances of the anthropologies underpinning those systems. Thus, while advocating individual freedom, it has also insisted on the relational aspect of human beings and on the "common" good.<sup>351</sup> However balanced this approach of CST might sound, it

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<sup>349</sup> As argued in Chapter 6.3, the CA can contribute to CST vision through the distinction between process and opportunity aspects of freedom, and through the more nuanced distinction between capability-freedom and choice-freedom. In this regard, the CA combined with the personal relationality of CST can provide a robust anthropological basis to assess wellbeing and promote human development through economic policies transcending utilitarianism.

<sup>350</sup> See also Valley (1998).

<sup>351</sup> This anthropological clash has coincided with the narrative battle in economics between "neo-classic" and "neo-Keynesians" schools, particularly regarding "economic freedom" and the role of the state. The former

cannot avoid the question of *how* to promote the development of each person and her uniqueness through a communitarian idea of flourishing. Is this not a contradiction in terms? And can CST do it on its own?

Based on the newness of the Kingdom and its relational anthropology,<sup>352</sup> CST has developed its idea of human flourishing as ‘integral and authentic development’ (IAD). As mentioned earlier, according to this conception, human development is a holistic or ‘integral’ process for the *whole person* and for *all peoples*. When growth is boosting only one dimension of humanity (e.g. material), or is benefiting merely one sector of the population (e.g. the affluent), then development is not entirely human and lacks authenticity. The main reason being that humans cannot flourish and reach their full potential if they develop only partially, whether this partiality is individual (just one dimension of the person’s existence) or social (just for one or for a group of individuals).<sup>353</sup> Indeed, for CST, human beings are conceived as ‘persons’ rather than as ‘individuals’ (*Gaudium et Spes*, 12-22). A person has an individual uniqueness, but cannot be developed outside or above society, because she exists exclusively in society and for other people (*Compendium*, 34.106).<sup>354</sup> Likewise, a society cannot truly develop outside or above persons,

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started off in 1970s, and since then has been highly influential in global capitalism. It argues that the original Keynesian theory on the existence non-economic motivations or irrational behaviour of agents, which allowed state intervention to control the freedom of individuals and corporations to trade in the markets, was not watered down enough during the post WWII period. Hence, individuals have been limited by states and regulations from being truly independent and creative, thus to develop. What is needed, neo-liberals argue, based on the assumption of universal rational economic behaviour, is to set the individuals free from ‘nanny-state’. This will help individual agents to produce abundant fruit. Contrariwise, the “neo-Keynesians” argue that rational behaviour, understood in terms of maximisation of profits, cannot be the only motivation economists should take into account when designing economic policies. Economics, for this line of thought, actually works when people are really human, reason for which all human motivations count. These arguments are particularly evident in the emerging field called “behavioural economics” (see Akerlof and Shiller 2009), but it can also be found in other economists such as Amartya Sen, as explained in Part I-4.2.

<sup>352</sup> As explained before, this idea derives from a responsorial understanding of the mystery of God and humans.

<sup>353</sup> If the individual is an individual-in-relation, this means, if relationality is constitutive of our being, then the relational dimensions require progress too. Without progress in this dimension, development is not authentic.

<sup>354</sup> Paul Ricoeur (2000:10), similarly, argues that without ‘institutional mediations’, ‘individuals are only the initial drafts of human persons’. The reason being that, unless humans belong to a political body -where institutions are crucial- they cannot flourish as such. Therefore, institutional-political-communitarian mediation cannot be revoked when aiming at human development. However, Ricoeur clarifies, this belonging has been explained differently by another version of liberalism, embedded in the social contract tradition. For this approach, the individual is already a complete person (and subject of rights) before entering into the contractual relation. ‘He gives up real rights... natural rights in exchange for security, as with Hobbes, or for civil status or citizenship, as with Rousseau and Kant’ (ibid.:9-10). But given that this understanding of association is ‘insecure and revocable’, Ricoeur prefers the previously explained one, which is anthropologically irrevocable, because it sees social relationality as an essential requirement for human advancement (ibid.:10). Yet, as Hanna Arendt claims and Ricoeur concurs, the risk of admitting this fundamental social dimension in order to progress as human beings, is to belittle the personal and inter-personal identity, stressing too much on the collective one, a perfect scenario for authoritarianism (ibid.:3.8).

because social life is always ‘an expression of its unmistakable protagonist: the human person’, who is the ‘subject, foundation and goal’ of any community (ibid.).<sup>355</sup>

This stress on communitarian flourishing does not seem to match, *prima facie*, with an approach that emphasises individual freedom, as the CA does. Can we justify the participation of the CA in a dialogue based on a relational notion of human development?

### 10.3. The parable and CA: relational capabilities

Although we cannot expect Sen to accept the idea of a God who spreads his seeds of life everywhere, nor the notion of the world as the Kingdom of God, it is not unreasonable to expect a positive reaction to the proposal of having *The Parable of The Sower* and its relational anthropology as a basis for the dialogue. First, as explained earlier, because there is a precedent of accepting parables of the New Testament to further explain the CA, as occurred with the *Parable of the Good Samaritan*. Although Sen does not accept the idea that the Good Samaritan was Jesus and God made man -a core theological content of the parable- (Snodgrass 2008), nor does he use the term ‘solidarity’ in itself –a pivotal outcome of the parable,<sup>356</sup> he still finds the story compelling and enriching, and uses it to delve deep into the idea of responsible agency. Analogically, Sen does not need to accept that the Sower is our Creator, nor that the ultimate outcome of human flourishing is the response to such Creator’s grace. However, Sen could accept the parable of *The Sower* in terms of a universal and non-discriminatory religious story that explains how people receive the seed or capacity to flourish (i.e. people’s abilities to translate their functionings into capabilities), a flourishing that depends on the quality of the soil (environmental and social surroundings) as much as on the willingness to develop (personal commitment to live a reasonable worthy life).

According to all that has been said so far, one can assume that the holistic-individual idea of human flourishing of CST/IAD, can be associated with the CA. As argued previously (Part II), although the CA puts a strong emphasis on the development of *individuals*, it is by no means an individualistic-libertarian approach. First, because ‘functionings’, which tell us something crucial about choices and individual behaviour, are always socially and historically contextual (Chapter 6.2). Secondly, because, for the CA, a person can only function and be well, when she is entitled to access things or services she values as pivotal to her flourishing. But those values, in

<sup>355</sup> On a personal note, in January 2014, we introduced this idea of “persons” (instead of individuals) to development agencies in Sri Lanka. The reception of the idea was quite positive, particularly because, they argued, it has helped them to further expound to Buddhist believers the principle of subsidiarity of CST (Meeting 24/01/2014, National Council for Reconciliation and Peace, Colombo).

<sup>356</sup> Note that Sen’s engagement with that parable did not come from the CST explanations of the principle of solidarity, but rather from the Biblical story that underlines such a principle.

order to be reasonable, require approval by public contestation or what Sen calls ‘public reasoning processes’ (Chapter 6.3). Thirdly, because the CA, following Adam Smith, considers that self-interest –usually the starting point of market operations- is inextricably related with self-love and with healthy relationships (Chapter 6.4.1). Fourthly, because the CA, following Rawls, argues that individual freedom cannot be uncoupled from social responsibility (Chapter 6.4.2). An agent is somebody who can choose to act or respond in one way or another, precisely because she is free.<sup>357</sup> Moreover, for the CA, wellbeing cannot be confined to personal utility or welfare, because acting as free individual ‘agents’ does not mean that our standard of living will necessarily improve; we may sacrifice our own wellbeing for the sake of others (Chapter 6.4.3). Finally, because, if the CA is related to what people value so as to live a worthy life, it is hard ‘to envision cogently how persons in society can think, choose or act without being influenced in one way or another by the nature of the working of the world around them’ (TIJ:244-5) (Chapter 6.5).

All things considered, the CA cannot be identified as an individualistic approach. On the contrary, while it presents an excellent vision of how individual freedom operates, particularly regarding economics, it is evident that the relational dimension of freedom is crucial for their wellbeing. Thus, the CA can be part of a discussion emanating from *The Parable of the Sower*, which illustrates a relational model of development.<sup>358</sup> This being the case, however, we still need to investigate which features of relationships individual agents and societies would need so as to enhance development/freedom and wellbeing/justice. We argue that a combination of CST and CA can provide more convincing answers than any other emanating from CST or the CA on its own.

#### 10.4. The Parable and the dialogue between CST and the CA

If the narrative of inter-related fertility, suggested by the *Parable of the Sower*, is shared by CST and the CA, we can assume it could work as a frame to the dialogue proposed herein. Capabilities can refine IAD, and IAD can further the idea of relational capabilities. In order to get there, and given that we have studied in depth the CA in Part II, we would need to investigate the theology underpinning IAD.

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<sup>357</sup> This approach echoes the model of ‘responsorial-development’ illustrated in *The Parable of The Sower*.

<sup>358</sup> We are aware of the debate around the CA being relational or individualistic (see Daka 2008 and Robeyns 2009), and of some proposals that consider the possibility of having “collective capabilities” due to the arguably ontological relationality of the CA (see Stewart 2005, Smith and Stewart 2009, Martins 2007, Deneulin 2008). Due to limitations of space, we cannot address these debates here. However, we believe we have given enough arguments to support the thesis that considers the CA a feasible partner to discuss human development on the basis of a relational model of flourishing (see also 9.1-9.3).



### 10.4.1. Essential relationality

Man is by nature a social animal; an individual who is unsocial naturally and not accidentally is either beneath our notice or more than human.... Anyone who either cannot lead the common life or is so self-sufficient as not to need to, and therefore does not partake of society, is either a beast or a god (Aristotle, *Politics*, 1253 A).

From Aristotle onwards, but particularly in our era, social sciences have stressed the fundamental role relationships play in human development. Psychologically speaking, we can be troubled when we see others just as rivals or even as hell, as Sartre (1989) pointed out.<sup>359</sup> In those cases, actual communication is unlikely to happen, thus impeding the yielding of fruit.<sup>360</sup> Likewise, sociologically, we know that nothing can exist without relations, and that when relations are overlooked, human development is undermined (Durkheim 1953). Pedagogically, as P. Freire (1993) taught, a person who prohibits others to enhance their being cannot 'be', because one can reach him/herself only so long as the others can reach their own 'self'. Economically, as explained in Chapter 4.1, many schools of thought led by prestigious economists consider that inter-subjectivity is a core aspect of economic rationality (Hargreaves Heap 2004), and there is extensive research on how the relations between agents and institutions define and explain economic theories (Boettke 1990, Olstrom 2010, Hodgson 2004, Davis *et al.* 2004).<sup>361</sup>

Christian theology, for its part, has also developed this crucial relational characteristic. As said before, it has done so by relying on the belief that humans are created in the image and likeness of God (Gn 1:26). If God is love, and love supposes a dynamic of relations, a 'me' who

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<sup>359</sup> In the play *Huis Clos* (No Exit) (1944), Sartre described the life of three persons who passed away and were sent to live together in a single room without doors. The eternal 'otherness', hence, can be seen more as hell rather than as salvation. For more on this topic, see Bell (1989:83-84).

<sup>360</sup> Coelho and Figueiredo (2003) explain how experiences of inter-subjectivity are constitutive of the self. In order to analyse the dimensions of the 'otherness', they describe four matrices of inter-subjectivity, all of them interconnected and acting simultaneously in the process of the constitution and development of the person: (i) trans-subjective (Scheler, Heidegger, Merleau-Ponty); (ii) traumatic (Levinas); (iii) inter-personal (Mead); and intra-psycho (Freud, Klein, Fairbairn, Winnicott). For the connection between inter-subjectivity and dialogicality, see Marková (2003). For an account on the importance of relationality in psychology, and even the influence stories have in our relationships, see Sternberg (1998).

<sup>361</sup> On an interesting note, some economists, like Bowles and Gintis (2011), argue that the *homo oeconomicus*, as a *homo sapiens*, is in constant evolution, which, they argue, tends towards cooperative networks. One of humans' main characteristics, is their exceptional ability to extend cooperation 'beyond close genealogical kin and include total strangers, and occurs on a much larger scale than other species except for the social insects.' (ibid.:2). Although market exchange is highly motivated by self-interest, it needs to be understood more as mutualism than as individualism. This is because the market aims at a mutual benefit, and because people who tend to overtly take advantage of the others in a selfish way, are sooner or later punished by the market (Shiller 2012). (See also 6.4.1).

offers himself to a 'you' and vice-versa, then we have reasons to believe that 'in'<sup>362</sup> God -or what is technically known in Christian theology as 'immanent Trinity'-, loving reciprocal relations are constitutive.<sup>363</sup> But 'outside' God, in what is known as 'economic Trinity' or God-in-relation-with his creation, does this relational essence exist? Although responding to this question goes beyond the scope of this thesis, we can provide a basic synthesis of how Trinitarian theologians have addressed it.

In principle, a relational essence cannot be found in creatures as in the 'immanent Trinity'. 'In' the Trinitarian God, the perfect communion of their loving relationships generates a total unity, but still maintaining personal distinctiveness; it is expressed in a completely altruistic way, yet in full reciprocity. In other words, the Trinity exists due to its perfect relations: God *is* 'being in relationship'. Conversely, although humans are relational or social creatures, we know from experience that our relationships neither generate total unity nor perfect reciprocity. Thus, we *are not* 'beings in relationship' as God is, but we *have* relationships. However, this does not mean that our relational capacity is merely accidental. If this were the case, our individuality would contain in its essence all that is needed in order to fully develop our being and achieve maximum potential or what Ancient Greeks called εὐδαιμονία: *eudaimonia*.<sup>364</sup> But our relations with others, with the environment and with God, can either lead us towards or distract us from living well and to the full (*Compendium*, 109). Our relationships, therefore, are fundamental for the development of the self. They cannot be regarded as optional, because they are, in this sense, crucial for our development and hence constitutive of our being.

Still, as creatures, our relationality, although begotten by the relationship with God the creator, is not essential in terms of being identical to our individual self, as occurs 'in' God.<sup>365</sup> Human response to the generated relational self is, as said before, neither total nor perfect. This is precisely what the *Parable of the Sower* suggests. It is the Word of God that generates life, and our response is the key for human fulfilment. Some may respond with damaging relations, not producing anything nor developing as human beings. Others may answer with friendly though superficial relationships. Because they do not have deep roots, these relationships will not

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<sup>362</sup>Inverted commas are needed to talk about 'in' or 'outside' God, because actually nothing is beyond God, who is the absolute being, or as Thomas Aquinas argues, the 'relational subsistence' (*Summa Th.* I-I, q.29).

<sup>363</sup> For more on intra-Trinitarian relations see Thomas Aquinas, *Summa Theologica* I-Iae, q.27-43, Gonzalez (1996), Cambón (2000).

<sup>364</sup> For a good account on the notion of *Eudaimonia* in Aristotle, see Hughes (2013:19-50). For the connection between *Eudaimonia*, human development, and justice, see Nussbaum (1992). For some scholars (e.g. Hoksbergen 2013), Sen prefers to omit the discussion on evil and how it affects individual agency due to the fact of his *Eudaimonism*, which has no theory of sin and emphasises the positive actions and virtues on how to achieve the fulfilment of life.

<sup>365</sup> According to Aquinas, only God has a perfect 'being', because *in omni creato essentia differit a sue esse* (*Summa Th.* I-I, q.3-4).

endure, not permitting the person to produce fruit and flourish. Conversely, others may reply with rooted and healthy relationships, which will allow them to bear fruit, thirty, sixty or a hundredfold. These persons are the ones who are equipped to live a life to the full. The trouble is that, responding with or through relationships to the seed of good life, so as to achieve wellbeing, does not depend exclusively on the individual and his capacities, but rather on the way he uses his capacities to relate to others and his environment, and on the way he is enabled by social/economic/political structures to participate<sup>366</sup> This, for CST, is a crucial reason for which individual freedom or development cannot be divorced from the good of the common, from social justice. But if relationality is essential for human flourishing, which rooted and healthy relations are those capable of yielding wellbeing?

A basic feature of relationality, according to CST, is 'personal reciprocity'. In the next section, after unpacking the concept, we will question the role it can play in enhancing the dialogue between CST and CA, particularly through the notion of 'agency' and 'public reasoning', both pivotal for CA/TIJ. In synthesis, and paraphrasing the *Parable of the Sower*, we will analyse whether this concept can act as fertiliser to human soil, and if it can aid people 'to bear fruit, thirty, sixty, and a hundredfold.'

#### 10.4.2. Personal reciprocity

In the artistic environment, artists need to express their individual inspiration or talents in the best possible way. However, experiences and statements of renowned artists, such as Van Gogh, reflect that the best art needs more than individual capacities. What is required is a sort of collective collaboration through which the limitation of one isolated artist can be transcended.<sup>367</sup> Musicians have also reflected on the quality of creativity when there is a special rapport with members of a band, a choir or an orchestra, a quality that is not always possible to achieve in isolation. Also, artists generally consider that they do not simply produce a piece of art, but that in such production they give of themselves. Whether it is a song, a painting, a sculpture or a poem, the piece of art contains the gift and truth of the person. For this reason, artists are often concerned about how their art is received by the public. But this is not merely for economic reasons or for psychological reassurance; it is rather for the sake of creativity and beauty in itself. For example, after a live performance, musicians often thank the public because they have never

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<sup>366</sup> For Pope Francis, 'faith reveals just how firm the bonds between people can be when God is present in their midst. Faith does not merely grant interior firmness, a steadfast conviction on the part of the believer; it also sheds light on every human relationship because it is born of love and reflects God's own love' (*Lumen Fidei*, 50).

<sup>367</sup> For a collection of statements from Van Gogh and other artists on this topic, see Cambón (2000:124-128). For a Trinitarian explanation of artistic creativity in music, see Pochet (1978; 1996).

been able to perform in such a high quality way. It is the rapport with the public that allows creativity to flourish.

These examples illustrate that we flourish through “the other”. The best of our seed, is generally the fruit of inspiring relationships, in which, although we maintain our unique individuality, such uniqueness is yielded through our relationality (personal relationality). This is already suggested in the *Parable of the Sower*, and is further developed by Trinitarian theology with the term *περιχώρησις* (*perichoresis*): a special presence of mutual reception and reciprocal ‘com-penetration’ or rapport between persons (Cambón 2000). From Revelation we know the persons of the Trinity are related in a *perichoretical* way. This means that the three divine persons unify themselves by distinguishing from one another, or are distinguished from one another by unifying among themselves. In other words, despite their distinctiveness, none of the divine persons is absorbed or overshadowed by the other (ibid.).<sup>368</sup> For CST, due to our likeness to God, among human relations, we also have a special distinctiveness, in the sense that each person is unique and different from any other. However, in human bonds, unlike in God’s relations, this distinctiveness can follow either a path of detrimental opposition, such as seeing the other as a permanent competitor (a threat), or a path of constructive bonds. Although I am not the other, I am, and can live well, and can develop my own self, due to the other. Or put better, I can freely exist *in* the other (ibid:38-39). Thus, when our unique individuality is mutually respected, our personal development is fostered and a healthier society is enhanced, permitting justice to be brought about.<sup>369</sup>

Nonetheless, what happens when “the other” impedes my flourishing? In Sen’s terms, what happens when unhealthy connectedness impedes individuals from developing their autonomy, hence from living a life they consider valuable and meaningful? For the sake of this Thesis, which attempts to promote a dialogue between CST and CA, our response will be focused only on two aspects of relationality relevant for the CA: free agency and public dialogue.

#### 10.4.3. Agency and freedom

One of the main contributions of the CA to political economics is the concept of ‘agency’.<sup>370</sup> Not only has it helped policy makers to recognise and challenge when persons are considered mere ‘means’ of production and consumption, but it has also provided ideas on how to evaluate

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<sup>368</sup> For a theological criticism of the use of *perichoresis*, see Kilby (2000) and Tanner (2004). For a counterargument, see Soskice (2007) and Gorringe (2014). This debate exceeds the scope of our research.

<sup>369</sup> For a further argument on justice, wellbeing and relationality, see Chapter 12.

<sup>370</sup> See Chapter 6.4.

agents' subjective wellbeing, transcending utility-functions and including cultural and religious values (see Alkire 2002; 2004 and Appendix 4).

CST's notion of equal unique distinctiveness, based on the category of *perichoresis*, can be useful in refining the way we understand the CA idea of 'free agency', because it not only offers a wider framework with which to assess the quality of relationships transcending individual utilities and capabilities, but it also comprises individual and structural relational breakdowns. In other words, while CST addresses the serious anthropological reductionism that sees the human person as an economic agent driven primarily by self-interest and a utilitarian desire, as the CA does, it goes further by emphasising our relational anthropology, for which, cooperation, solidarity and gratuitousness look even more rational than self-interest. Still, relational anthropology is a dual one, since good will for cooperation and trust goes *pari passu* with selfishness, betrayal and sin. Hence, CST relational anthropology not only combats utilitarianism, but also any other reductionism that belittles the gravity of sin; thus the need for conversion.

For CST, the idea derived from the concept of *perichoresis*, suggests that in our relationships, when we give space to others in order to enable their unique self-distinctiveness to blossom, actual freedom is enhanced. Conversely, not giving such a space is detrimental to our capacity for being free agents. This is applied to either personal or social bonds. For example, invading such space in the name of social welfare ('asistencialismo' or 'paternalism') is as damaging as ignoring its existence (individualism). Paraphrasing the *Parable of The Sower*, although agents' space is not an absolute individual plot of land, and despite the fact that the production of fruits heavily depends on the relation with the environment (other seeds, other ground, communal landscape, common weather, etc.) being fruitful still depends on the unique individual properties of the seed (freedom), which needs to be respected so as to allow it to blossom.

For instance, in the *villas* of Buenos Aires, the space individuals need for their development and its relation with the social environment, was systematically violated during the last decades. In the 1990s, neo-liberal economic policies, with a strong emphasis on the freedom of individuals, dismissed the fundamental communal aspect of development.<sup>371</sup> Populist programmes following in the 2000s, with a heavy emphasis on social progress, tended to belittle the importance of individual freedom, without which the seed of agency cannot blossom.<sup>372</sup> On top of that, well-intentioned Catholic (and Christian) aid programmes, aiming at redressing the ill-being reflected

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<sup>371</sup> For an explanation of the negative effects of the 1990s neo-liberal economics in Argentina, see Teubal 2000/1 and 2004. For an explanation of the different causes of the failure of neo-liberal economics in Argentina, see O'Neil Trowbridge (2001). For Argentine's neo-liberal political economic programmes as a case study, in relation to negative development, see Cooney (2007).

<sup>372</sup> See Chapter 7.2 regarding the example of malnutrition in Argentina.

by situations such as unemployment, lack of education or undernourishment (Observatorio 2012), have been frequently lead by a misunderstanding of charity as merely social or personal assistance. The combination of these three approaches has generated an unhealthy economic dependency that impedes actual autonomy to flourish (Hilding Ohlsson *et al* 2013).

In short, the unique personal distinctiveness championed by CST, when respected, fosters integral and authentic development/freedom. Still, as the CA argues, this respect, if it is to have any impact on wellbeing/justice, requires being part of public reasoning processes.

#### 10.4.4. Dialogue and participation

The CA argues that freedoms of individuals need to come together in processes of public debate.<sup>373</sup> However, as explained in Chapter 7.3, these processes comprise several difficulties. Questions arise regarding the way those who suffer could organise themselves so as to make their voices heard; or the motivations of those who are better-off entering into open dialogue altogether; or the way all agents involved could find common ground for their discussion of social development, without any preconceptions regarding the nature they have in common and the good they are aiming at. Another fundamental question is how the causes of injustices can be addressed by the partners in dialogue.

##### *Individual reasons and common ground*

With regard to the question of the common ground, one might think that in any social dialogue or public process of reasoning –as Sen calls it-, we ought to find agreement for the betterment of the common good. But it can occur that, as Sen points out, people have different views about what the meaning of ‘the good’ and ‘the common’ can be in any particular situation.<sup>374</sup> However, while Sen trusts in human reasoning, in that, sooner or later, a better agreement will be achieved through a reasoning process rather than through any other non-participatory or irrational process, we also know, from experience, that people have a different understanding of what ‘reasonable’ means in concrete situations. As H. Arendt (2005) argues, reasons that can be appealing to many may still be detrimental to the good of others, in some cases to many others, as often occurs in the rising of a totalitarian regime (e.g. Nazism).

Individual or communal reasoning on its own seems to be insufficient to bear abundant human fruit. Therefore, if humans want to flourish ‘in common’, which is the only way of authentically doing so, Sen is right in asserting that we cannot take for granted the notion of the common good. We need to respect the reasons and values of each individual and test them and

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<sup>373</sup> See Chapter 7.

<sup>374</sup> Precisely for this reason, Sen is inimical to accepting the connection between the CA/TIJ with the notion of ‘the common good’, as overtly stated in a conference at Oxford University, Sheldonian Theatre (June 6<sup>th</sup> 2013).

contest them in a public dialogical process. But if this process of reasoning is to be fruitful, i.e. to enable people to flourish, we can neither take for granted the notion of individual reasoning nor of public respect for the voice of ‘the other’. A possible contribution of CST to this public dialogical reasoning process is that, in the process of reasoning, we need to consider the unique distinctiveness of the other and envisage whether the eventual agreement can contribute to enhance it. This, matched with the CA’s insistence on open plurality, can serve as an antidote to forging processes of dialogue in which the freedoms of individuals are abusively constrained.

It could be argued that a CST contribution to any process of public secular reasoning is absolutely impossible (Dawkins 1995 and 2000). However, in addition to what has been said,<sup>375</sup> if what is at stake is human wellbeing, which depends on the quality of relations, and if such quality can be improved through a reasoning process of dialogue and participation, it is not unreasonable to trust that people will experience this respecting of the unique distinctiveness of the other as a way of refining the quality of dialogue and, indirectly, as a way of improving the quality of life. Moreover, if one of the main causes of ill-being is the organisational disrespect or discrimination or indifference to individuals and groups (e.g. in the *villas*), a society in which individuals and groups recognise that they live *with, for, in* and *thanks to* the others, seems to be better equipped to redress an unfair *status quo* than those who persist in an anthropological approach of perennial competitiveness.

### *Voices of the poor, ears of the rich*

Returning to our example of malnutrition in Argentina, and the caveats found when trying to overcome it only with the CA,<sup>376</sup> the CST/IAD approach can promote encounters between children and parents in the *villas* who suffer severe (22.5%) *and* moderate (39.6%) food insecurity. A ‘unique distinctiveness’ of dialogical style and the sense of reciprocity might help the two groups to join forces to discuss and fight publicly against malnutrition. Without this kind of dialogical style, those in a less severe position tend to avoid listening to the ones who are worse-off, because they spend their dialogical energy in trying to improve their own situation by engaging in conversation with those who are better-off. Conversely, the advancement of a kind of *perichoretical* dialogue among the *villas’* inhabitants would help them regroup in order to make their voices heard in the greater society. They would be able to see their differences not as an antagonism, but rather as a denaturalisation of equality, especially of equality in a given

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<sup>375</sup> See Chapters 3 and 9.

<sup>376</sup> See Chapter 7.2.

similar socio-economic realm.<sup>377</sup> Put together, children suffering from severe and moderate malnutrition represent half the child population in the *villas*.

Moreover, a *perichoretical* dialogical scheme would promote encounters between children and parents who belong to the middle social income households and those of the *villas*. This would raise the awareness of the disproportionate risk to malnutrition (65% to 8%) between both groups. This awareness would increase people's motivation to combat the lack of respect for individuals unique' distinctiveness and their capabilities.<sup>378</sup> While this is already occurring in Catholic parochial circles (Mithchel 2012), the idea could be extended through wider development programmes based on the CA.

### *Public listening, personal flourishing*

There is another theological consideration that may help in promoting a fruitful public dialogue: the way we listen to each other. While the CA leaves space for agents to freely decide this 'listening', CST highlights the need for a particular kind of listening. As Simone Weil (1962) said, those who suffer have no need of anything in the world except people capable of giving them their attention.<sup>379</sup>

For CST, the *kenotic*<sup>380</sup> characteristic of the Trinity reveals that God personifies 'attention without distraction' (Cambón 2000), and that the persons of the Trinity can empty themselves so as to listen fully in order to allow new things to happen (crucifixion-resurrection). Due to our being made in the image and likeness of God, humans do indeed have the capacity to listen in this way too. We are able to pay attention to others with unselfish interest, to hear what the other says without thinking simultaneously how we can respond. Indeed, the only way of comprehending what the other appreciates is to somehow empty oneself and embrace the other, going beyond the limits of language and trying to reach the unique and loving being behind the words (*ibid.*). This way of listening opens a path for freedom and human flourishing. But could this way of listening and dialoguing actually be possible in the public arena?

A special flourishing way of listening, characterised by these Trinitarian features, already exists in social secular dialogues. We have mentioned before the example of the artistic world. Similarly, in the academic world, new ideas are produced, generally speaking, due to sincere dialogues between scholars. We are not trying to idealise academia, as if in it the use of others'

<sup>377</sup> Chapter 12 addresses the topic of equality/inequality and its relation to wellbeing/justice.

<sup>378</sup> Chapter 11 expounds on the motivations people have to act for the sake of interests which go beyond their own self (altruism).

<sup>379</sup> An excessive need for attention could result in what is known in psychology as 'Histrionic Personality Disorder' (Widiger and Bornstein 2001).

<sup>380</sup> From κένωσις (*kenosis*): to empty oneself or losing oneself in order to be fulfilled or found.



ideas, the stilling of thoughts or the lack of attention were absent. But novel and fruitful research is often underpinned by serious and attentive debates and consultations (e.g. Sen 2009). Likewise, in the ecumenical and inter-religious dialogue, despite the tensions (and even wars) in the name of faith in our modern era, Trinitarian models of dialogue are aiding the advancement of the conversation (LWF-PCPCU 2013). A revealing case is the forum organised a decade ago by Hans Küng, where representatives of different religions deployed their virtue of listening by emptying themselves of *a priori* arguments. This does not mean that they set aside their own beliefs, but that in the interchange of convictions, by enabling the core ethos of the others to flourish, they were also able to rediscover and reaffirm their own central values, generating a fruitful outcome (Küng 1994).

Still, the grounds for this dialogue, with this particular way of listening, as Küng's case shows, need not be just the participants' virtue of listening and debating, but also a structure that permits those virtues to flourish. When structures for the debate are set in such a way that the strongest voices cannot impose themselves over the weakest ones, where the unique being of each participant is respected, regardless of majorities or minorities of followers, then the ground for people to deploy their potential conversational virtues is cleared, thus the chances for the dialogue to succeed increase. What the example of world religious dialogue depicts, is that a public dialogue, in order to enable human flourishing, requires a proper structural environment or organisation. It cannot depend exclusively on the individual capabilities of the people involved, as seems to be the narrative of prevailing economic programmes. This is a modest although valuable contribution from CST to the CA's public reasoning proposal.

### *Individual sins and structural failures*

We have argued that human development depends on relationships, and that the advancement of them depends on public reasoning processes. Still, most humans have experiences of abandonment, of relationships that have been fundamental to our development but at a certain point have broken down, or disappeared, or stopped being the grounding of our wellbeing. Most people have also experienced the devastating effects of personally destructive dialogues, or of socially detrimental discussions. This reveals our imperfect way of relating to each other, a failure often –though not necessarily– caused by sin.

CA suggests that, to tackle the causes of failure in relationships and the injustices derived from those situations, what is needed are processes of public contestation, in which comparisons of situations/relations and the incorporation of dissonant voices is crucial (TIJ:169). Yet, as explained in Chapter 7.3, the exercise of freedom and plurality comprises failures that call for

further anthropological examination. For CST, imperfections in relationships that hinder human wellbeing are explained by the 'Tragedy of Sin' (*Compendium*, 115-119), a narrative that illustrates our undeniable capacity to do wrong and cause harm to ourselves and others, intentionally and unintentionally. Indeed, conflicts and a certain amount of violence are always present in our social relationships, economic and political ones included (see Cambón 2000:145-148; Arielli and Scotto 1998; CELAM 1976 and 1981; *Caritas in Veritate*, 34). Thus, a proposal to promote development/freedom through public dialogue cannot ignore this disruptive human capacity.

Addressing the far too complicated issue of original sin, and its insightful views on any anthropological study, exceeds the scope of this dissertation. For the purpose of this chapter, which aims at setting the framework of the CST-CA dialogue, we will mention only the two aspects we consider most relevant. The first one is the explanation of sin as personal *and* social, which both widens the common understanding of sin as mere individual failure, and helps to relate sin with a personal-relational model of flourishing.

As Ruiz de la Peña (1993) puts it, our sin is "personal" because it is neither exclusively individual nor solely social. Given that we are persons-in-relation, the sin is always relational. This means that the cause of sin is neither a 'mono-cause' (the individual misuse of freedom) nor a 'poly-cause' (the natural tendency of our nature, or the social structures that force us to sin). Our sin, thus, is always somehow connected with the 'originated' sin of Adam (our nature),<sup>381</sup> but it ultimately depends on the freedom each person has, and the way she responds through her redeemed nature, to the 'relational-self'.<sup>382</sup>

Perhaps Sen would agree with the fact that each 'individual' agent can ruin his capabilities to 'be' and live well, and that by so doing may also hinder others' capabilities too (cf. TIJ). But by emphasising both the individual and relational (social) aspects of sin, CST highlights the need to look beyond individual capabilities when analysing the causes that ruin social relations.<sup>383</sup> For

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<sup>381</sup> See *Catechism of the Catholic Church*, 404.

<sup>382</sup> Sin is not our ultimate fate. As Cambón (2000) argues, given that our nature has been redeemed (rescued) by the Passion of Christ, a loving (*perichoretical*, *kenotical* and *agapean*) connection with the origin of all beings (God) helps humans to exercise their free agency in order to consolidate their being and make their existence produce fruit, i.e. better relationships.

<sup>383</sup> This does not mean that individual capabilities and responsibilities are not important. In fact, Sen specifically argues in favour of a balance between individual choices and institutional ones (TIJ:77-82), about the need of awareness of inter-personal relations beyond country borders that generate further responsibility (TIJ:141-2), about the need to transcend our individual positional view so as to widen our view of the reality of mutual connections and hence our understanding of responsibility (TIJ:172-3), and about the social commitments and goals that, due to our 'bounded rationality', necessarily go beyond self-interest (TIJ:188-190). In sum, Sen argues that individual capabilities help people to deploy effectively and efficiently their responsibilities. Moreover, as explained before (see Chapters 6-7), for Sen, the Kantian notion of imperfect obligations is crucial to enhance

Sen, these causes are either limited to wrong individual decisions or to the un-fulfilment of imperfect obligations, hence not entirely rational in terms of deploying individual agency for the betterment of living well, as in the case of a sixteen-year old boy in a slum of Buenos Aires, who is addicted to Paco (a cheap devastating drug). He has clearly made an individual decision to consume Paco, resulting in his becoming violent, due to his craving for the substance. Yet, his individual capabilities/freedoms are seriously constrained due to the circumstances (e.g. the need for more substance to consume). Thus, as Sen explains, if individuals actually lack personal freedom, having little or no option to choose that which could bring wellbeing, what needs to be questioned is *why* these people end up losing their freedom? Sen's explanation suggests that there can be causes that go beyond the mere rational decision of an individual. Still, Sen's argument falls short of indicating what the causes are (Deneulin, Nebel and Sagovsky 2006).<sup>384</sup> This leads us to the second insightful contribution of the theory of original sin: sinful structures.

For CST, although sin is ultimately based on one person's free decision, every sin is also –and always- social, because the consequences of any sin transcend the mere individual, affecting our fundamental relational dimension created by God and redeemed by Christ (*Compendium*, 117). It comes as no surprise that in the book of Genesis, the immediate consequence of original sin is described as the enmity between two brothers (Cain and Abel) -resulting in the killing of one of them- (Gn 4:1-15), and the disruption of social communications (Babel), which prevents the building up of structures for social development (Gn 11:1-9), and even in an environmental destruction (Gn 6-8), which impedes any kind of human progress and requires a new creation altogether (Gn 9). According to CST, therefore, if our personal nature is relational, then even the most private sin cannot but affect our relations, undermining our capacity to flourish and disrupting human cohesion and solidarity.

Some sins, of course, are social not merely because of their consequences, but also due to their specific object, constituting a direct assault on our neighbours, as occurs when we inflict physical or verbal violence on people we dislike (*Compendium*, 118). Yet, the sociality of other sins is more complex. It is not just about their consequences or objects, but about their contexts, i.e. when sins are embedded in a social structure. CST calls them 'structural sins' (*Sollicitudo*, n.36). This is the case of systems or organisations that have been established in a sinful way, thus fomenting behaviours that are against fruitful human bonds and against the will of God;

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individual responsibility, while the idea of 'plural affiliation' is critical to frame social obligations that can promote justice. This is something CST would entirely agree on (see Chapter 8).

<sup>384</sup> E.g., the boy's decision cannot be divorced from the lack of loving relationships in his family, nor from the lack of kindness and understanding when he went to primary school, nor from the absence of jobs, nor from the non-existence of effective public programmes of drug-prevention and rehabilitation for drug-addicts.

behaviours which are difficult to resist and hard to remove. Precisely because they grow stronger, they spread and become sources of other sins, seriously conditioning the conduct of those involved in such a structure.

For instance, when countries set up their economic policies with the sole purpose of increasing the GDP, regardless of the actual wellbeing of their population, this generates a culture of absolute profit desire. This is generally translated into corporations which aim exclusively at making more profit, and gaining more power to facilitate it, regardless of their responsibilities as employers, tax payers, and legal economic citizens, something that became apparent after the last financial crisis (Wilkinson and Pickett 2010, Lansley 2011, Stiglitz 2013, Noah 2013). Moreover, individuals in this culture can hardly escape from the all-consuming desire for profit. Consequently, they (we) tend to see taxes as an extraction from our wealth rather than as contributions to society, the organisation of which permits our generating of such wealth; the society which also ought to take care of others who are more needy (see *The Economist* 2014:5). In this system we also tend to see cheating in prices or in interest rates or in exams as an opportunity to take advantage and increase our profit (whether material or intellectual), rather than as a lie that unjustly affects others. Furthermore, we tend to see wasting of food or water as an inevitable consequence of our life-style, or the contamination of the environment as collateral -though indispensable- damage to achieve progress (Northcott 2007).

But what can we do against this structural evil? One can argue that because it does not depend entirely on individual responsibility, it is not an individual's fault; meaning that if I am part of this structure, I am not entirely responsible for the social harm it provokes, thus liberating me from doing anything about it. However, as CST argues, it is not legitimate or acceptable 'to understand social sin in a way that, more or less consciously, leads to a weakening or the virtual cancellation of the personal component, by admitting only social guilt and responsibility' (*Compendium*, 117). The CA notion of agency and personal responsibility would support this argument.<sup>385</sup> But if this is true, *what* can individuals and societies do about it?

Following our argument, an essential means of fighting this kind of structural sin is to enhance our relational dimension and to strengthen our capacity to cooperate with others. This is not limited to intimate or friendly relationships only, but also comprises societal or communal association, generally channelled through churches, NGOs, political groups, families, social movements, etc. For CST, when our capacity to cooperate is transformative, and when it generates cultures in which people can flourish, it proves the existence of human's capacity for

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<sup>385</sup> See Alkire (2006).

‘public love’ (*agape*), which CST believes comes from our being created in the image and likeness of God (Benedict XVI 2005 and 2009, Cambón 2000, Calvez 1990).<sup>386</sup> Still, the potential human skills to transform structural sins through public love cannot be actualised without what the CA calls public reasoning processes. Indeed, as CST contends, the transition from structures of sin to a culture of freedom does not depend exclusively on personal conversion or individual capabilities. It is precisely through processes of public dialogue where structural sin can be discussed and converted.

Translated into our example of the *villas* in Argentina, one can argue that child malnutrition is a structural sin, because it is generated not merely by one or a group of individuals, but rather through particular socio-economic and political structures. It is also structural because people who suffer from it are not entirely responsible (if responsible at all). The path to escape from this social structural disease, hence, will not come exclusively from the political side, nor from the economic one, nor from the sociological or theological one. What is needed is a multi-disciplinary approach that can tackle the unjust structures hindering relationships and wellbeing from its roots. This plurality can only be channelled through public reasoning processes aimed at enhancing freedom/development and wellbeing/justice.

To sum up, CST’s theory of original sin,<sup>387</sup> which is a way –though not the only one– of explaining our tendency to damage our relational self and prevent human flourishing, can contribute to enhancing the framework for the dialogue between CST and CA. Firstly, because it helps to explain why individual sin is always connected with our essence, providing a solid basis for the analysis of personal and communal responsibilities in the search for human flourishing, something stressed by the CA. Secondly, because sin –according to this theory– is always personal, but also social. This is due not merely to the fact that any sin has pernicious consequences for our personal relations, but also has consequences for social organisation. This complements the idea of capabilities, which emphasises the positive aspect of freedom without

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<sup>386</sup> Benedict XVI (2005) argued that ἀγάπη (*agape*), a kind of love normally with divine characteristics due to its un-conditionality or gratuitousness, can be also expressed by humans, who were created in the image and likeness of God. He contends that this kind of love can even be deployed in our socio-economic relations. For Benedict XVI (2009:nn.6-7), this is not just a possibility, but a necessity for the promotion of justice. Analogically, in *Nicomachean Ethics*, Aristotle argues that φιλία (*philia*) although a kind of love normally identified with family relations (e.g. parents with children, 1158b20) or with lifelong friends (1156b12), or even with young lovers (1156b2), can also be found in the public arena, i.e. in political or business relations (1158a28;1163b35), among members of the same religious society or tribe (1160a19; 1161b14), and in relationships between cities (1157a26) (see Hughes 2013). Both Aristotle and Benedict XVI highlight the importance of structural organisations of society embedded in love, either understood as *philia* or *agape*. They argue that the existence of such structures is crucial for the development of the relational-self, of our human nature. We expound this argument in Chapters 11-12, when explaining the principle of ‘gratuitousness’.

<sup>387</sup> For a full theological account of the theory of original sin, see Ladaria (1997).

much explanation of its negative dimension. Thirdly, the theory of original sin contributes to the CST-CA dialogue, by providing reasons for considering the structural aspects of liberty and of failure in relationships. Programmes and policies which ignore this structural dimension of sin will not be able to efficiently promote human development.

#### **10.4.5. Fostering relational development**

What a CST-CA alliance can offer to policymakers is a solid basis to enhance freedom while assessing together individual capabilities and structures, both in their positive and negative relational dimension. It can also provide a guideline to augment the positive and redress the negative aspects of relationality, i.e. the theoretical grounds of public reasoning processes. This contribution, emanating from the combination of CST and CA, does not lie in concrete economic policies, but rather in a wider view of how relationships, a basis for development -or underdevelopment- operate, and in how the failures of such relationships can be overcome.

In order to limit the damage of pernicious relations, especially in economics, public dialogical processes are critical, because they can channel agents' differences whilst respecting their individual capabilities. However, as explained in Chapter 7.3, those processes present some caveats that neither the CA nor CST can overcome on their own. Conversely, by matching the two approaches, novel paths can be found, as suggested with the example of relationships in poor neighbourhoods of Argentina. By addressing the difficulties the deprived may encounter in being organised and making their voices heard, or the motivations of the affluent in entering into a dialogue with them, or issues around the nature of the common grounds or the aim of the dialogical processes, and by interrelating social structures (and structural sin) with personal capabilities (and original sin), the CA-CST partnership can provide compelling narratives of wellbeing, certainly more realistic than the prevailing utilitarian one.

### **10.5. Conclusion**

Based on the reflections of the parable of *The Sower*, we have argued that the Kingdom of God (the basis of CST) is open to 'other soils'. This has a methodological and an anthropological consequence. The former, as also explained in Part I (Methodology), means that openness and interaction with other terrains or subjects is pivotal for the fruitfulness of any theological social analysis of present realities, especially if such analysis aims at influencing current political-economics. Hence, grounded in the narrative of *Parable of The Sower*, this Chapter has developed the framework for the dialogue between CST and the CA.

The anthropological consequence of the newness of the Kingdom, is an understanding of life as a related-interdependent process. Relations and dependence comprise the environment, other seeds (humans), other soils (societies and structures) and, arguably, The Other or the creator of all. It is precisely through this process of relations that human flourishing can be either promoted or hindered. More importantly, human flourishing is meant to be understood as a response or fruit of these interactions. 'Res-ponses', while including 'res-ponsibilities' towards the care of others and the surroundings, as argued by Sen, also depend on the quality of relations.

When this CST relational understanding of human flourishing is meshed with the CA, what arises is a model of social relations that can sustain human development by strengthening human bonds, something lacking in prevailing economic theories. Hence, as this chapter has argued, the outcome of the CST-CA dialogue may, eventually, offer to economics a model of sustainable and fruitful relations. Because this model can enrich the analysis of 'reasoning', 'agency' and 'participation' (public dialogue) on the one hand, and delve deeper into an understanding of the structures underpinning people's reasons and capabilities on the other, it can help not only in assessing economic growth and the quality of agent's relations, but also in fostering a framework for the dialogical processes that can enhance actual human advancement.

We can therefore conclude that the CST-CA partnership can help promote a culture of relationships that allows not only individuals, but also peoples, to develop their own authenticity, identity or unique distinctiveness. The *Parable of the Sower* has cleared the ground for us to set the framework of this partnership in terms of development/freedom and wellbeing/justice. In the next two chapters, we will be focused on alternative narratives of development and justice respectively.

## 11. Development & Freedom: *The Unmerciful Servant*

After justifying the use of the Parables of the New Testament in order to promote the CST-CA dialogue (Chapter 9), we studied the *Parable of the Sower* so as to frame the conversation (Chapter 10). We argued that the relational model of human flourishing depicted in the parable underpins CST's anthropological notion of 'person-in-relation', fundamental for an 'integral and authentic development' championed by CST. We explained why this model is compatible with the CA, and how, when brought together, the assessment and promotion of wellbeing can be enriched.

This chapter analyses a different parable to illuminate ideas of development/freedom and wellbeing/justice, which are the subject of our study. *The Unmerciful Servant* (Mt 18:23-35) invites reflection on issues of relationality introduced in Chapter 10, more precisely, into economic relations and the intriguing motivation of agents to deploy gratuitous behaviour. Although the theory of an 'economics of altruism' is a serious liberal attempt to respond to issues of gratuitousness in economic transactions, it is still under the umbrella of utilitarianism, a vision the CA argues needs to be superseded by a more realistic one based on actual freedom. Still, the CA is shy of providing a compelling explanation of why agents act gratuitously within an economic environment ruled by the logic of retribution. By linking Sen's economics initiatives and the parable's (and CST) suggestion of the feasibility of a complementary logic of gratuitousness in economics, this chapter argues, alongside the Italian economist Stefano Zamagni, in favour of an understanding of the logic of the gift as reciprocity. This logic, while enriching economic theory in general, has the benefit of promoting an enhancement of the capability of agents to recognise themselves through reciprocity, and buttresses agents' freedom by widening their understanding of strict-retributive relations.

We hope this reading of the parable can aid the CST-CA alliance in proposing a narrative model to counter the stories underpinning the present utilitarian economic thinking characterised by the *homo oeconomicus*,<sup>388</sup> for whom the phrase 'business is business' synthesises the tendency towards an individualistic approach. Still, to move from an individual approach to a social one without falling into communitarianism –which remains focused on the self, not an individual self (i.e. 'my interest') but a group (e.g. 'my country', 'my church', 'my

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<sup>388</sup> For an interesting explanation of the *homo oeconomicus* as a key character for utilitarian narratives, see Akerlof and Schiller (2009).



company' or 'my family' interest), economics needs to recover a healthy theory of relations.<sup>389</sup> This recovery is, for CST, one of the main challenges economics is facing at present (*Caritas in Veritate*, 36). In order to achieve it, theological logics are not enough. Similarly, commercial logics cannot solve in themselves the problems generated by distorted relations in the market (*ibid.*, 34). But the 'logic of the gift as reciprocity', as embedded in CST personal anthropology and including elements of the CA, provides thought to face such challenges. It will be argued that this theory can transcend the nature of the self-utilitarian *homo oeconomicus*, as well as the idea of justice limited to commutative or distributive matters.

As mentioned before, when explaining the method to analyse the parables,<sup>390</sup> this chapter is not a detailed biblical examination of *The Unmerciful Servant*, nor does it specify the vast history of the reception of the text. What the chapter does attempt is to introduce a view of development/freedom from the perspective of the novelty of the Kingdom, and connect it with some pivotal topics of CST and the CA. This link, -we argue- can improve future development policies and enhance people's freedom and wellbeing.

Let us take a look to the text, one of the most revealing parables of all, because, alongside that of *The Sower*, it discloses the essence of the parables of The New Testament (Snodgrass 2008). In addition, along with the parable of *The Two Debtors* (Lk 7:41-34), it reveals the core of Jesus' Kingdom message, particularly regarding divine 'grace' (i.e. the gratuitous gift from God to creatures) and human 'responsibility' (i.e. the way we respond to God's gift) (Snodgrass 2008:61); and it does so through stories based on economic relationships, pivotal for our study.

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<sup>389</sup> We do not intend here to dismiss communitarian theories (for more on a communitarian approach to justice, as oppose to a liberal one, see Sandel 1998 and Taylor 1989). However, the removal of a self-referential theory in economics, when replaced by a communitarian referenced one, could belittle the importance of the individual and his/her choices on the one hand, while on the other, might side-line the relations freely fuelled by 'agapean' behaviour (Zamagni 2005).

<sup>390</sup> See Chapter 9.4.

<sup>21</sup> Then Peter went up to him and said, 'Lord, how often must I forgive my brother if he wrongs me? As often as seven times?' <sup>22</sup> Jesus answered, 'Not seven, I tell you, but seventy-seven times. <sup>23</sup> 'And so the kingdom of Heaven may be compared to a king who decided to settle his accounts with his servants. <sup>24</sup> When the reckoning began, they brought him a man who owed ten thousand talents; <sup>25</sup> he had no means of paying, so his master gave orders that he should be sold, together with his wife and children and all his possessions, to meet the debt. <sup>26</sup> At this, the servant threw himself down at his master's feet, with the words, "Be patient with me and I will pay the whole sum." <sup>27</sup> And the servant's master felt so sorry for him that he let him go and cancelled the debt. <sup>28</sup> Now as this servant went out, he happened to meet a fellow-servant who owed him one hundred denarii; and he seized him by the throat and began to throttle him, saying, "Pay what you owe me." <sup>29</sup> His fellow-servant fell at his feet and appealed to him, saying, "Be patient with me and I will pay you." <sup>30</sup> But the other would not agree; on the contrary, he had him thrown into prison till he should pay the debt. <sup>31</sup> His fellow-servants were deeply distressed when they saw what had happened, and they went to their master and reported the whole affair to him. <sup>32</sup> Then the master sent for the man and said to him, "You wicked servant, I cancelled all that debt of yours when you appealed to me. <sup>33</sup> Were you not bound, then, to have pity on your fellow-servant just as I had pity on you?" <sup>34</sup> And in his anger the master handed him over to the torturers till he should pay all his debt. <sup>35</sup> And that is how my heavenly Father will deal with you unless you each forgive your brother from your heart.'

The parable is structured in three scenes (Söding 2009). In the first one (vv.23-27), a Master or King decides to settle the accounts of his servants; in the second (vv.28-30), the forgiven debtor becomes an unmerciful creditor; the last scene (vv.31-35) is about the final judgment. We firstly discuss what an initial and naïve reading (Ricoeur 1976) of each scene would be like. Secondly, we step back from the text to question the image of the Kingdom -hence of God and of human relations- that the parable comprises. Thirdly, by going back to the parable, we hope to discover some of the newness of the Kingdom contained therein. Finally, we attempt to connect such newness, particularly the inclusion of gratuitousness in economic relations, with CST and the CA understanding of development/freedom and wellbeing/justice.

## 11.1. Reading the parable (I): first impressions

### 11.1.1. Settling accounts with debtors

We can notice the importance of economic relations and 'accountability' right from the beginning. Among the servants, there is one who stands out because of his huge unpaid debt: 10,000 talents (v.24). A talent 'is a measurement of weight of gold, silver or copper', whose value varied depending on the metal used. Scholars differ in the way to compute the debt. Jeremias (1972:210) calculates that one talent was the equivalent to 10,000 denarii, hence the servant's

debt would be around 100,000,000 denarii. If the average wage of a Palestinian worker was one denarii a day, then the servant would need a whole eternity to cancel the debt. Similarly, for Jones (1999:270-271), for whom one talent is the wage of about twenty four years for an average worker in that region, the servant would require 200,000 years to pay; and Keener (1999) calculates around 250,000 years. If their calculations are right, the debt is so astronomically large that what the parable is trying to highlight is the actual impossibility of repaying it so as to emphasise the great generosity of God's gratuitousness. But other scholars (e.g. Söding 2009 and Snodgrass 2008) prefer to be more cautious. Although they agree that it is a substantial debt, they consider it is neither unrealistic to have acquired it, nor unfeasible to cancel it. If it were a ridiculous amount of money, listeners would not be attracted by the story, because they would feel that such a crippling and massive debt could never be part of their lives, not even if they were serving powerful masters. This would dramatically reduce the listeners' connectivity with the story, which is unlikely to be the intention of the teller. Following this line of thought, for modern listeners, a talent could be the equivalent of approximately £60 to £100 (Snodgrass 2008:66).<sup>391</sup> Thus, the amount of the servant's debt in present currency would be around £600,000 to £1,000,000. Although the parable does not tell us the servant's occupation, the fact that he was not a steward or a master could be an indication that his income was not very high. It is as if an employee of the NHS in London had monthly mortgage repayments on his house, far in excess of what he earned.

Notwithstanding the debate and uncertainty on how to exactly calculate the debt, what we do know is that it is a serious one. As the indebted servant cannot pay, the Master commands the sale of all his goods (v.25). Using personal goods for a guarantee was an ancient financial practice, a practice still widespread today. But the King also orders the servant to be sold as a slave, along with his wife and children (v.25). This sounds cruel, not only to modern ears. Original listeners probably found it hard to accept too, since Jewish laws of that time forbade the selling of the wife and the torture of the debtors (Snodgrass 2008:66) and the Old Testament has a negative view of the selling of people as a means of cancelling debts (e.g. 2Kgs 4:1; Neh 5:5; Is 50:1 and Am 2:6). With this drastic and brutal decision,<sup>392</sup> the King expects to recover some of his

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<sup>391</sup> We have opted to follow Snodgrass (2008) and Söding (2009) for three reasons. First, it is some of the latest research on the topic. Secondly, it is thoroughly based on the text itself, which allow us to continue using our literary method without much interference from outside. Lastly, their calculation sound more attuned with the story and the message of the parable, at least in the way it is interpreted herein.

<sup>392</sup> For some scholars the parable reflects the cruelty with which debtors were treated, implicitly criticising the Roman system of the time (Dodd 1961) and of Herod in particular, who was well known for his despotic tortures (Snodgrass 2008:66). In this same line of thought, others argue that the parable not only underlines the unjust financial and tax system of the time (and of the future), but that it also shows how, within this kind of oppressive system, there is no room for the spirit of biblical 'jubilee', which celebrates the coming of a new world or realm

money, although a considerable part of the debt would probably remain unpaid. But the actual problem does not seem to be the full recovery of the King's loan, but rather the hopeless personal situation of the servant, who throws himself at the feet of the King, begging him for patience (v.26). Not only does he humiliate himself by such a gesture, but also, in his desperation, makes the foolhardy promise to repay everything (v.27). Unfortunately, this promise does not sound credible. How can he repay such a huge debt even given the extra time eventually granted by the King?

For a worker-servant of that time, it would have taken many productive years of his life to make that sum, presumably far more than the ones the servant had already served. Listeners, hence, may feel intrigued by the problematic promise of the servant. If the master grants him more time, how is he going to pay anyway? At this point, when listeners may wonder about the cancellation or refinancing of the debt, the parable introduces the unexpected reaction of the creditor. He does not accede to the servant's pleading. Instead, 'moved by compassion',<sup>393</sup> he writes-off the servant's debt (v.27)!

#### 11.1.2. The cruel forgiven debtor

While in shock, listeners are taken to the second scene (vv.28-30), where the forgiven debtor becomes an unmerciful creditor (Söding 2009). Although what he is owed is dramatically less substantial than the debt he had been forgiven (100 denarii is nothing compared with 10,000 talents -approximately 6,000,000 denarii according to the most cautious calculations), he stands firm in demanding the repayment (v.28). This sounds perplexing and annoying at the same time. On the one hand, one might expect that the understanding he experienced from the King could be replicated, especially with peers. Indeed, the servant has no superior status but rather a horizontal relation with the debtor (both are fellow servants of the same king). However, he claims his debt in an arrogant and violent way, shouting at the desperate man, grabbing him by

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based on forgiveness and justice (Eerlemaann 1988). Hence, this new realm or the Kingdom of God should be totally different, and requires the elimination of these structures. Others even go further and argue that what the parable shows is the inadequacy of messianic hope and of kingship altogether, implying that people should look elsewhere to reduce injustices and reform the world economic system (Herzog 1994:131-149). However, these interpretations are not supported by the majority of modern scholars, for whom the parable focus is not the criticism of a concrete political-economic system, but rather the encouragement to forge new relationships with which to enhance novel ways of being politically and economically related. For details about the different exegetical and hermeneutical arguments, see Snodgrass (2008) and Söding (2009), whose theological line we follow.

<sup>393</sup> As explained in Part I-2.1, 'moved by compassion' in the New Testament has a particular and fundamental meaning. ἐσπλαγχνίσθη (*esplanchnisthē*), from the verb σπλαγχνίζομαι (*splanchnizomai*), means to be moved from inside, from the entrails, and to express it accordingly with external actions. Although this verb is regularly used in Scriptures to describe God's attitude, some parables of the Kingdom, such as *The Good Samaritan* and *The Unmerciful Servant*, indicate that it is also part of our human nature, created in the image and likeness of God and redeemed by Christ.

the neck and almost strangling him in his request (v.28). This is a sharp contrast with the dignified dialogue he had had before, when he was in debt to the king.

Moreover, because his fellow servant is in the similar hopeless situation he had been in recently, one would expect this former debtor to show compassion, particularly when his fellow servant begs for an extension (v.29). This gesture should have resonated with him because it was almost identical to the one he had made to the king (see vv.26/29). The only difference being that the gesture in this second scene is even more humble, because here it is a servant begging one of his peers, not a king. Despite the humble attitude of the servant-debtor, the servant-creditor is not moved at all and deploys the conventional understanding of justice (then as now) as the fulfilment of contracts,<sup>394</sup> regardless of the person involved and of her circumstances. Disconnected from his peer's feelings (and from his own), he sends the poor man to prison until he repays the debt (v.30). All this generates in the listeners a lack of sympathy for the creditor-servant, worsened by the disproportion between the two debts involved. In fact, due to the small amount of the debt under consideration in this second scene (100 denarii), the promise to cancel it -were the deadline extended- sounds credible and feasible (less than one year's work), unlike the promise the unmerciful servant had made before, which would have required decades, not to say a life-time.

Listeners can therefore perceive the contrasting attitude between the servant as debtor and the servant as creditor. He was treated with respect by a King, but he cannot treat a fellow servant in like manner. He was shown great compassion due to his desperation, but he is merciless. His immense debt was freely cancelled, but he cannot forgive another a small debt. He had desperately begged for a lengthy extension and was listened to, but he denied a brief extension without even considering the humility and desperation of his fellow debtor. The sharp contrast demands an urgent solution, which comes up in the following scene.

### 11.1.3. The final judgment

The last scene (vv.31-35) starts by introducing 'other servants' who have witnessed the whole saga and are probably experiencing the same concern as the listeners. What the unmerciful servant has done seems wrong. The disproportion between the way he was treated by the King and the way he treated his fellow servant is so wide, that the witnesses cannot but be 'indignant' (v.31). Indeed, when we experience a clearly unfair situation, we tend to feel angry,

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<sup>394</sup> For more on justice as 'contract' -as opposed to justice as rights, or dialogue, or efficiency, or social critique- see Campbell (1988:66-95). The author explains why Rawls' theory of justice was an attempt to perfect this ancient idea of justice as contract, but linking it with social welfare, and hence to the concrete circumstances of the parties involved, particularly the weakest part of the contract.

which is usually a symptom of healthy violence, a sign of virtue.<sup>395</sup> Also, when ‘seeing’ a given circumstance and ‘judging’ it as unjust, we also tend to clamour for a solution; we desire some ‘action’, we expect somebody to bring justice to the case.<sup>396</sup> This is exactly what ‘the other servants’ do, and report everything to the King.

The King also experiences the same anger as the rest. Listeners hence are reassured that their feelings are ‘right’, that their indignation with the unmerciful servant is more a constructive social virtue than a destructive fury. Finally, the King provides the much-expected solution. After rebuking the servant, he withdraws his former gratuitous decision of cancelling his debt. In contrast with the previous gentle dialogical way of settling accounts, the King now offers neither the possibility of dialogue nor of defence. He does not even give the servant extra time to pay, as originally requested, but sends him straight to the ‘torturers’ till he pays his debt. Given the magnitude of the debt, this final reckoning is equivalent to almost a life-sentence in prison.

Let us summarize the listeners’ itinerary so far. In the first scene, along with the first servant, they are shocked by the unexpected and unconditional forgiveness of an astronomic debt. Since then, there is a growing expectation to see how the servant is going to react to such an extraordinary gift. But great expectations are followed by a bitter disappointment (second scene), when the servant who received much compassion is unable to be compassionate himself. The dynamism of the story allows listeners to identify themselves with the co-servants (third scene), who, after witnessing everything, turn to the King, seeking a solution. Both servants and listeners may feel relieved with the King’s final judgement which condemns the unmerciful servant and puts him in his place, i.e. in prison for life, or for eternity. Justice is done, because this servant is finally treated as he deserves, i.e. according to his actions.

Nevertheless, it is precisely when the listeners condemn the ungrateful servant that they are actually condemning themselves (Söding 2009). The moment they agree with the retributive justice drastically applied in the final scene, they are undermining the logic of compassion the Kingdom brings. And when justice is blocked off from compassion, there is only room for anger, violence and death (v.34); it is here that the Hobbesian “brutish” anthropology blossoms. The brutal initial decision of selling people and family to repay a debt is now confirmed by the listeners’ feelings. They are pleased (or justified) at the end of the story, when a brutish

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<sup>395</sup> Aquinas distinguishes between ‘righteous anger’, i.e. the one caused in response to evil, and anger caused by sinful rage (see *Summa Theologica* I.II:q.23 and 46). Similarly, Sen (TII:1) argues that the anger produced by injustices is not only reasonable, but also crucial for the fight against those unwanted situations.

<sup>396</sup> Seeing, judging and acting is crucial for CST methodology, as explained in Part I. We notice here an indirect and remote biblical precedents of the method.

incarceration takes place. It is a savage imprisonment because it transcends the restriction of freedom of the individual, comprising also physical, moral and psychological damage. For the sake of the King's credit and power, and in order to 'do justice' and preserve 'order', the servant is sentenced to permanent wretchedness. Moreover, the cruel uncompassionate attitude showed by the ungrateful servant -which originated from a supposedly 'virtuous' anger and desire for justice- is now also shared by the co-servants and listeners. Was it a 'virtuous-just' anger, or a merely violent inclination? Should they be indignant with themselves too? In short, by agreeing with the outcome of the parable, listeners are actually reaffirming their desire to be part of a world in which unjust financial systems, alongside a lack of compassion, impede wellbeing and justice (*ibid.*), and 'man becomes the wolf of man' (*homo homini lupus*).<sup>397</sup>

### 11.2. Reading the parable (II): stepping back from the text

What is the solution suggested, if any? The parable, consistent with its own literary genre, implies an open end. The narrator hopes that members of the audience can find different endings according to their different life-experiences. Still, he seems to be aware that the listeners would better comprehend the openness of the parable and the newness of the kingdom by stepping back from the parable and discovering the connection with their own lives.<sup>398</sup> Exiting the story, according to Söding (2009), may allow them to acknowledge the dynamic of compassion and justice of the text, may permit them to existentially connect it with their own experiences, and may give them the courage and wisdom to revisit the parable with different eyes. By so doing, listeners can also discover a novel way of understanding God, humans, and the relation between them. The outcome of this process is expected to promote a way of life that can enhance actual wellbeing through a fundamental anthropological dimension: *compassion*, which involves the *logic of gratuitousness*.

When stepping back from the parable, a first literary question and theological concern arise. If the parable shows that we cannot apply strict retributive justice without risking human wellbeing, what would the position of the King in the parable be? The initial overwhelmingly merciful King is, in the end, a fearless authoritarian powerful creditor who, like Herod, tortures his debtors so as to recover his money and maintain his power. Can this King represent God? This question has attracted much scholarly debate (see Petzoldt 1984, Snodgrass 2008 and Söding 2009). Although pivotal for a proper theological reading of the parable, we cannot address it

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<sup>397</sup> The phrase is taken from Hobbes, *On the Citizen* (1998). For an analysis of this phrase and its importance in political theory, as well as for more bibliography on the topic, see Rossello (2012).

<sup>398</sup> These are the three 'naïveté' steps mentioned by Ricoeur (1976); see Chapter 9.4.



here, since it will divert us from focusing on the CST-CA connection and on the topic of gratuitousness within economics. Based on the referred bible studies, we assume that the role of the King does not necessarily represent the image of God, but rather a human beings' image and likeness of God. Humans, in their economic activities, can be deeply uncompassionate, true, but they can also be as merciful as God (cf. Lk 6:35-38; Mt 18:18). For this reason, we now go on to consider how viable the concept of gratuitousness is for economics.

In fact, the parable implies that gratuitousness is not merely a matter of relations between relatives (Lc 15:11-32), or with members of a same group, or a church (Mt 18:15-20); nor is just a matter of a religious commandment (Mt 18:21; Lk 17:3). Gratuitousness, as well as its inextricably related attitudes, i.e. compassion and forgiveness, is also a cornerstone for the promotion of development/freedom and wellbeing/justice. This view of the parable has been followed by CST, and it is summarised in the encyclical *Caritas in Veritate*: 'the logic of the gift does not exclude justice' (n.34). On the contrary, it fosters trust, which enriches market relations, hence producing social cohesion (n.35). Without this logic of gratuitousness, the market would not be able to fulfil its proper economic function of permitting people to trade so as to help them flourish (nn.35-36). In other words, 'the intention to do good must not be considered incompatible with the effective capacity to produce goods' (n.65).<sup>399</sup> But can gratuitousness be applied in present economic relations? Can a secular economic theory accept the parable's proposal?

### 11.2.1. The logic of the gift in economic relations: a liberal response

Given that a logic of gratuitousness is opposed to the one of retribution (*do ut des*), it could be argued that this logic can never be applied to economics. Because gratuitous compassion lacks a price, and due to the fact that it is given unconditionally, i.e. not taking on board peoples' merits or demerits, it is clearly foreign to the logic of the market. Hence, the theological request of the parable/CST, that compassion and mercy ought to be applied in all circumstances and relationships, whether economic or otherwise (Snodgrass 2008:76), is utopian.

However, even disregarding (hopefully temporarily) CST's approach, economists still need to respond to the fact that, even within market operations, agents' choices are often not driven by the desire of maximisation of utilities and minimisation of losses (utilitarianism). As Sen (TJ:176-193) argues, the response can neither be merely because agents are unable to seek for or appropriately use information in pursuit of a rational choice (cf. Simon 1979), nor can it be solely

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<sup>399</sup> For CST, 'the great challenge' of our economic and financial time is 'to demonstrate... that in commercial relationships the principle of gratuitousness and the logic of the gift... can and must find their place within normal economic activity' (*Caritas in Veritate*, 36).



due to agents' weakness of will (cf. Schelling 1984). 'Since human beings can easily have good reason also to pay some attention to objectives other than the single-minded pursuit of self-interest, and can see arguments in favour of taking cognizance of broader values or of normative rules of decent behaviour', economics ought to explore alternative answers to rational choices transcending utility-function or the logic of retribution (TIJ:179).

One of the most important attempts to tackle the conundrum of gratuitous behaviour within economic models holding a logic of retribution, was to consider gratuitous actions in terms of 'altruism' or alter-ego (see Andreoni 1990).<sup>400</sup> The departure point of the *economic theory of altruism*, developed in the last quarter of the twentieth century, was to counter the idea that the 'ego' is the only key-player in economics, i.e. that agents, when doing business, operate with no other determination than to seek and maximise the interest of their 'self', thus considering the relationships with 'the alter' as resources (means) to achieve a self-centred goal (see Jensen and Mecking 2001). Yet, according to *the economics of altruism*, the *homo oeconomicus* does not limit his interest to 'self-wellbeing', a fact evidenced in pro-social behaviour transcending the mere self-utility rationale. Why, then, do some agents, sometimes, operate gratuitously?

For Becker (1974), the inter-dependence of economic agents, even when gratuitous actions are involved, implies mutual benefits. Ultimately, the donor expects to have a benefit, not necessarily material. Moreover, the argument continues, the donor is able to 'give' so long as the recipient can benefit proportionally to the donor's utility-loss. When this proportion of utilities is absent, the tendency is to avoid donations. Andreoni (1990) goes even further. In terms of voluntary contributions to the public good, he argues, the benefactor seeks to be at peace with his conscience, on the one hand, and expects a social 'warm glow' on the other. Altruistic behaviour, hence, expects reciprocity and benefit from it. Other economists interpret altruistic actions as a moral imperative (Etzioni 1986, Frank 1988, Simon 1990). For them, these actions are not moved by an honest interest in 'the other', but rather by a sort of Kantian categorical imperative through which the agent operates in order to fulfil his/her own development. Hence, the supposedly alter-centric initiative, is still driven by a self-centred preference.

In short, for the liberal theory of *economics of altruism*, agents behaving gratuitously within economic relations still seek personal benefits. Whether these benefits are the reduction of

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<sup>400</sup> We are aware that it is not the only economic school that has developed a theory that transcends (or counters) the mere utilitarian approach. We have picked up the *economic theory of altruism* merely as an illustration, and because its contribution has been highlighted by TIJ. Other examples abound regarding, for instance, the literature on 'rotating credits' (ROSCA), where loans are made entirely on the basis of trust rather than on financial arithmetic calculations (see Rutherford 2000).

utility-loss, the appeasement of agents' conscience, the gain of social respect, or the successful fulfilment of moral imperatives is irrelevant. The truth, they argue, is that agents behaving altruistically do not apply an actual logic of gratuitousness, because they still make their choices under a logic of 'retribution'. According to this view, therefore, the logic of the gift, as proposed by the parable and CST, is not applicable in economics.

However, as the professor of economics of the University of Bologna, Stefano Zamagni (2005:306-310) argues, these theories are highly problematic. Firstly, empirical evidence 'shows *ad abundantiam*' that their prediction of generalized free-individual-utility-riding, as Zamagni calls it, does not match with reality (ibid.:307). Many donors do not calculate whether their donations are proportionally efficient to the utility cost, nor do all benefactors expect approval and admiration from their community. To vividly illustrate this, we can resume our example of Araceli and Gustavo. This couple, who live in a slum in Greater Buenos Aires, are constantly behaving in an unrecognisable way to the *homo oeconomicus*. Their support and donations to help free youngsters from the 'Paco' addiction is far from being a calculative contribution. As explained before,<sup>401</sup> they do so in spite of knowing that the outcome or benefits are not 'efficient' or will not be as proportionally important as their contributing effort is. Moreover, when contributing to public discussion in their community, or when campaigning for what they consider a good cause, they do not seem to expect any acclaim from the wider society. On the contrary, they are often bullied and highly criticised by many. An *economics of altruism* falls short in addressing these facts.

Secondly, economic theories based on altruism are problematic because the 'calculating altruism' cannot explain how gratuitous actions can generate social reputation. Indeed, a positive image can only be acquired when others do not realise the underlying eventual egoistic motivation. 'For an agent to be able to pass himself off as an altruist without being one, it has to be true that genuine altruism exists and that other people fail to distinguish between authentic and opportunistic altruism. After which, true altruism is still unexplained' (ibid:308).

Thirdly, even if agents recognise that donating is a duty or a good in itself, they still need to decide to do it. Suggesting that altruistic actions derive from a particular oppressive and heterogeneous ethical code is to deny the agent's freedom altogether, which would incongruently negate the kind of liberal economics the altruistic theories are advocating. Moreover, implying that altruism emerges just from a personal moral commitment, not necessarily from an encounter with 'the other', begs the question whether agents are not

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<sup>401</sup> See Chapter 6.4.1. For more on Araceli and Gustavo's motivation to act gratuitously, see Chapter 11.2.2.

considering the welfare of others, which they are seeking through their actions, as an end in itself. However, assuming a positive answer, how would they sustain such ethical principles when helping others implies the risk of hindering their own wellbeing or the wellbeing of their family? In these cases, the moral imperative to forge others' welfare will probably be blurred by another moral imperative of self-protection. Hence, when agents decide to do good gratuitously to others, despite the risk it entails, the explanation needs to be beyond moral imperatives.

Resuming our example,; how can Araceli and Gustavo persevere in helping young people recover from drug-addiction if they do not take into account the persons behind the problem? It seems unlikely that they would decide to sustainably contribute to this cause moved merely by an eventual personal ethical imperative. If their rationale were merely an ethical code to act justly, the negative pay-offs would constantly impel them to review their collaboration, and they would have sound reasons to, eventually, withdraw from their decision to act altruistically. The incentive seems to come from something/somebody beyond their interest, from a special relationship with the youngsters involved. This relation could be of identification, or solidarity, or compassion, etc. But whatever the characteristic of the relationship, it permits the agents to sustain gratuitousness beyond the maximisation of resources and even, in some cases, beyond the safeguarding of the self or group wellbeing.

To sum up, the explanation of the *economics of altruism* regarding the role of gratuitousness in economics is limited (Zamagni 2005). Although pro-social behaviour and its economic implications are recognised, it falls short in explaining the causes beyond individualistic or moralistic reasons. In particular, it overlooks the relational aspect that provides not only sustainable motivation to act altruistically, but also strengthens social bonds with which business transactions can enhance actual wellbeing.<sup>402</sup> This understanding of altruism, sadly, responds to the meta-narrative that sees altruism not just as a free disposition of material things, but also as something that a given business may commit to, only once it has achieved success. Translated into macroeconomics, investment in the wellbeing of the worse-off, or in the care of the environment, comes only after a guaranteed increase in the GDP. And even when the latter is increasing steadily, decisions on how to invest public income tend to omit the reality of gratuitousness and its transformative power for the wellbeing of communities. Those decisions are still underpinned by the logic of *do ut des* (Becker 1974), incompatible with the logic of the gift proposed by the parable of *The Unmerciful Servant*.

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<sup>402</sup> According to the above explained theories, altruism seems to be linked with acts of charity, somehow disconnected from structural justice, regrettably releasing the fundamental tension between charity and justice, a tension needed for human development (*Caritas in Veritate*, 6-7).

### 11.2.2. The logic of the gift for the CA

According to Sen (TJ:176-193),<sup>403</sup> we need a different economic explanation than the one the altruistic (yet utilitarian) view offers in order to give account, within economics, of gratuitous commitments or, in the language of the parable, the logic of the gift. For Sen, agents' rationality (or logic) is not confined to utility-functions. Other logics can live alongside the maximisation of benefits. To prove his case within liberal economics, Sen reminds us that even for Adam Smith (1790), individual freedom that fosters actual growth cannot be detached from agents' sentiments, among which benevolence (or gratuitousness) is included.<sup>404</sup> When free individuals manifest their sentiments or desires to do good to others in public, this usually carries economic implications. Besides, for the free-market champions who might be sceptical in accepting the proposal of competing rationalities operating together within market choices, Sen provides a further argument based on his deep knowledge of Adam Smith. Because economics deals with markets -fundamental institutions for the development of any society-, and given that markets do not come out of the blue, but rather are a reflection of individuals' thoughts, attitudes and sentiments, markets also necessarily reflect benevolent relations within their structures, i.e. transactions that aim at the good of others without expecting actual compensation. Even if it was merely for this reason, it would not be unfair to conclude that benevolence cannot be confined to the sphere of individual charity or private religion, but needs also to be considered within public economics, a boost for the parable-CST argument.<sup>405</sup> Still, despite Sen's extremely important openness to acknowledge benevolent or like actions within market-economics, he limits the explanation to individual capabilities, thus falling short in analysing in depth the motivations to act freely and altruistically.

For example, the non-calculative attitude of Araceli and Gustavo with regard to their help to 'paco' addicts,<sup>406</sup> could fall under what Sen (TJ:188-193) identifies as the capability of 'commitment', which is an inner dimension of freedom. However, Sen does not explore what happens to those commitments when they meet failure. In other words, what makes people do things to enhance justice when they see that what they are doing is not having much impact and seems useless? Given that the reduction of injustice is a never-ending process, and often fails (as Sen also admits), it is not unusual for altruistic persons to end up in indifference or in revolt, especially if their altruism is still driven by a self-centred intention. Genuine sustainable

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<sup>403</sup> See Part II.

<sup>404</sup> See Chapter 4.2.2.

<sup>405</sup> On the misunderstanding of Adam Smith as the promoter of economics without gratuitousness, see Chapters 4.2 and 6.4.1.

<sup>406</sup> As explained before (see Chapter 10.4.2), similar examples can be found in academia and art; as will be mentioned later, there are also examples in business (Finn 2012).

motivation needs to come from something/somebody beyond the donor's interest, even beyond the capability of being socially committed.<sup>407</sup>

### 11.2.3. Complementing the CA: 'the gift as reciprocity'

Furthering Sen's argument, and in order to connect the logic of retribution, as informed by economics, with the logic of the gift, as depicted in the parable, the economist Zamagni (2004),<sup>408</sup> also a member of the Pontifical Academy of Social Sciences and of the Human Development Capability Association,<sup>409</sup> explores a theory called 'the gift as reciprocity'. He explains why economic transactions are more than individual preference functions. Indeed, a central topic for traditional economic reasoning is the exchange of 'equivalents', based on transfers which are 'each the prerequisite of the other'. This means that transfers between economic agents are mandatorily bi-directional. While one agent transfers one good, another agent transfers something in return. The *exchange ratio* transfer, both logically and temporarily, precedes the transfer of the object exchanged. In other words, only after the buyer and the seller have agreed on the price of a given commodity, will the actual exchange take place; it will not happen without, nor before, this logic of reciprocal equivalence (ibid:19).

For Zamagni, this conditional reciprocity, grounded on the exchange of equivalents, is related, although contrastingly, with the unconditional reciprocity of the gratuitousness championed by CST.<sup>410</sup> Within this latter logic, transfers are voluntary, not mandatory, both logically and temporarily. Indeed, when somebody initiates a gratuitous or "*agapean*" transfer, the expectation of any reciprocity is extremely low in comparison with the "exchange ratio" transfer. However, the logic of the *agapean*-giver does not lack any expectation.<sup>411</sup> Although the *agapean*-receiver is not obliged to respond in any way to the gift, the *agapean*-transfer is nevertheless expected to affect him in some way. This 'affection', when it happens, not only

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<sup>407</sup> I am indebted to Dr. Mathias Nebel for this argument (*personal comm.*, University of Glasgow, *Interdisciplinary Colloquium for Academics, Practitioners and Activists: A Christian Responses to Hunger and Food Security*, 14<sup>th</sup> May 2012)

<sup>408</sup> For further reading, see Zamagni (2005;2010).

<sup>409</sup> Zamagni's ideas inspired Pope Benedict XVI to include a chapter on the logic of the gift in his latest social encyclical *Caritas in Veritate* (*personal comm.* with Zamagni, Cambridge, Jesus' College, *Symposium on The Crisis of Capitalism and The Common Good*, 28-20 November 2012). Moreover, the initial draft of the entire economic content of the encyclical (i.e. chapters:3-6) was actually written by a group of economists and theologians lead by Zamagni (*personal comm.*, Vatican City, *Symposium on The Global Common Good: Towards a More Inclusive Economy*, 10-12 July 2014).

<sup>410</sup> When linking these transactions with CST, Zamagni calls them the unconditional reciprocity of *agape*, understood as a capacity of humans to deploy "love" transcending the logic of retribution in public affairs. For more about the category of *agape*, informed by Biblical and Trinitarian theology, see Chapter 10.4.4 and Benedict XVI (2005, 2009). For further explanation of CST on *agape* in the political arena, see Calvez (1990) and Gambon (2000). For a philosophical account on the requirements of public *agape*, see Porter (1994:21-24).

<sup>411</sup> This resonates with Porter's (1994) position.

improves the bond between giver and receiver, but also enriches the receiver's general wellbeing. Zamagni calls it 'transitivity', arguing that these relations offer a unique triadic structure. The *agapean* transfers are bi-directional due to the gratuitous -yet relational- expectations, and are unlike uni-directional transfers, such as those occurring in altruistic or philanthropic donations, where the aim is to transfer for or on behalf of others. This does not mean that the reciprocal transfer must be directed towards the original donor, because it can still be reciprocated towards a third person, which symbolises the 'triadic structure' of this kind of reciprocity (Zamagni 2005:320). In other words, although the original transfer is a gift, it is a 'gift as reciprocity' (ibid.:324), because its strength lies neither in the giver nor in the gift, but rather on the qualitative improvement of the bond between giver and receiver.

In support of Zamagni's argument, which underpins the latest CST encyclical *Caritas in Veritate*, Finn (2012:77) quotes the example of an independent entrepreneur who receives a rush order and agrees to work during the weekend so as to deliver it. Although there is no contractual obligation, his overtime would enhance a spirit of cooperation with the agent who contracted him. Someday, they will do something similar for him, or for others, beyond formal legal or economic regulations or expectations. If this circle spreads, the outcome would be an increase in trust, which would result both in more solid relationships and higher quality business. Further validation of the logic of the gift can be found in recent game theories in economics, particularly regarding agents' motivations. The network games, which are defined not merely by the traditional pay-off matrix, but also by the social network matrix in which the weight of relationships between agents is quantified, has proved that agents' interests are not confined to the benefits from the interaction with others, but also to the relationship itself (Ellison 1993; Morris 1997; Macy 1996).<sup>412</sup> This means that the *agapean* logic acknowledges the fact that agents involved in the transactions are not only voluntarily interrelated, but also humanly interdependent. But if this relationship is to promote any substantial freedom and unleash any potential or actual dependence, it should start by breaking the exclusivity of the bi-directional logic of retribution. The *agapean* transfers, the argument continues, can indeed ameliorate the bond between those interconnected (even economically), precisely because they foster a freedom that is not restricted to one's will or merits or capacities, but rather is buttressed by the bond with "the other" or others. It is no wonder why, according to this line of thought, gratitude is key to growth and to human development and wellbeing.

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<sup>412</sup> Developing how these 'network games' operate goes beyond the reach of this Thesis. See the referred bibliography, Zamagni (2005:326-7) and Morris and Song Shin (2006).

#### 11.2.4. The logic of the gift: benefits

*The Unmerciful Servant* describes economic relations in which the logic of the gift appears at the centre. However, according to the nature of the *homo oeconomicus*, a pivotal character for the prevailing narrative of utilitarian economics, economic transactions belong to the territory of the logic of strict retribution, apparently incompatible with the logic of the gift: ‘business is business’; nothing foreign to it can be part of market operations. Still, modern economics needs to give account of those transactions where the *homo oeconomicus* acts against his nature, i.e. applying a different logic in business. We have analysed *economics of altruism*, which falls short in moving beyond the agent’s utility-function, as Sen pointed out. In contrast, the CA describes agent’s ‘gifts’ towards others’ wellbeing under the idea of social commitment. Despite this important contribution, further exploration is needed to address issues of agents acting freely, according to the logic of gratuitousness, even when the expected outcome, i.e. efficiency understood in terms of others’ wellbeing, cannot be achieved. Social commitment in itself does not seem to offer a compelling answer to gratuitousness in economics, because, as explained before, commitments focused on moral imperatives are not enough to motivate agents to keep acting gratuitously when their commitments meet failure.

Therefore, to complement the CA initiative of moving economically beyond utilitarianism so as to explain rationalities transcending the logic of strict retribution (e.g. choices to act gratuitously), and coinciding with the CA in terms of the existence of diverse logics operating in economic agents, Zamagni has elaborated a different theory: the logic of the gift as reciprocity. This approach acknowledges the fact that any economic explanation about gratuitous behaviour in market operations needs to shift the focus from the individual rational agent -and even from personal capabilities- towards relationships. One might wonder, though, whether Zamagni’s Catholic faith and his role as a Vatican consultant are inducing him to develop economic theories that are actually foreign to economic science. However, this fear can be allayed for several reasons. Firstly, because essential relationality, as explained in Chapter 10.4, is compatible with other secular approaches such as the CA. Secondly, because we can find some concrete examples in business, as Finn (2012) argues. And thirdly, because, as mentioned earlier, novel economic explorations, such as the network game theory, have confirmed Zamagni’s research in terms of the fundamental role of the relational matrix, from which non-utilitarian attitudes within market activities can be more widely understood; thus subsequent economic programmes contemplating and supporting this logic can ensue.

Due to its resonance with the Catholic anthropological understanding of essential relationality, it comes as no surprise that this theory underpins present CST, in particular *Caritas*



*in Veritate*,<sup>413</sup> which holds out the logic of the gift -or agapean logics in economics and politics- as a crucial source for the transformation of global economics. But what exactly are the benefits of embracing this proposal? Firstly, that CST's position on this topic, whose origin can be traced back to the parable of *The Unmerciful Servant*, is presently embedded not merely in a theological understanding of relations, but also in a serious economic approach that, by relying partly on the CA and its claim to give account of rational choices beyond utilities, has delved deep into the way relations enhance free choices. This positions CST as a capable partner to further discuss issues of development/freedom and wellbeing/justice.

Secondly, that 'the gift as reciprocity' enriches economic theory, because it offers a way out of the prevailing individualistic paradigm. If economics recovers the sense of relationality on which transactions are embedded, then subsequent economic policies would reflect their concern not merely for 'exchange value', but also for 'bond value' (Zamagni 2005:326). Note that Zamagni talks about 'recovering' and not 'including'. The reason being that before Amartya Sen and Adam Smith, Antonio Genovesi, who occupied the first chair in economics worldwide, argued that while re-distribution is not natural in human relations, reciprocity is. Reciprocity as a gift, indeed, has been present throughout cultures, even in pre-modern market economies, such as the *Ubuntu* in Africa. By resurrecting the importance of the 'gift as reciprocity', economics can contribute more effectively to the theory and practice of development/freedom and wellbeing/justice.

While commutative justice requires fair rules for competition, and distributive justice needs some authority beyond the market to deploy it, 'contributive' justice, based on the logic of the gift, cannot be enforced by rules, authorities or markets. Because it is based on the gift of gratuitousness, it is not enforceable at all. Still, as a gift to be developed or as a virtue to be nurtured, it can foster people's capabilities, i.e. development/freedom.<sup>414</sup> Moreover, it is fundamental to the possibility of living together in a shared society and planet, since it refines relationships of all sorts, economic transactions included (Zamagni 2012). Furthermore, the logic of gratuitousness can enhance the capability of agents to recognise themselves through

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<sup>413</sup> For the impact of *Caritas in Veritate* in present global policies, see the articles written by Guy Dinmore (2009) for the Financial Times. Dinmore argues that the Pope has influenced subsequent political-economic decisions of the G8 leaders, particularly those who are keen on tougher regulations on financial markets (e.g. Barack Obama and Angela Merkel). Also, the encyclical has given the moral support G8 leaders were requiring to forge 'food security policies'. Moreover, the encyclical has had great support from other religious leaders, including Christian, Jews and Muslims, and from economists, sociologists and other academics (see *First Things*, August 18, 2009). For an extensive analysis of the encyclical and its worldwide reception, see Finn (ed.) 2012b. For the reception of the Encyclical in the USA, see Sandona (2010). For *Caritas in Veritate* as an ethical tool to analyse the current financial crisis, see Zamagni (2012b).

<sup>414</sup> We will expound on wellbeing/justice in Chapter 12.



reciprocity,<sup>415</sup> because ‘the relationality born from the gift is such that the encounter with the other always determines, to some extent, a modification of the self that, in its return to its own interiority, finds itself ‘richer’ thanks to the encounter having occurred’ (Zamagni 2005:324).<sup>416</sup> Precisely because these encounters help the individual find his true self, people involved are able to move from ‘me’ to ‘you’, from ‘my interest’ to ‘your interest’ so that ‘our’ interest can be found. The finding of true self also generates trust, pivotal for the welfare of society and for a healthy economy.

Thirdly, the logic of ‘the gift as reciprocity’ can buttress agents’ freedom. As a consequence of the abovementioned individual-relational enrichment, the logic of the gift frees the beneficiary to respond to her benefactor in the same way, breaking the logic of reciprocate justice. ‘Whereas the gift as *munus* almost always generates dependence in those who receive it, and sometimes even submission’, the gift as reciprocity frees the recipient from the shame of not responding in like measure (ibid.:326). The beneficiary is free to respond in the way she considers appropriate, but should not feel obliged to reciprocate in such a way that, if she cannot fully do it, she will feel humiliated and end up with adverse feelings towards the benefactor. This is why the parable of the *Unmerciful Servant* does not ask for a mandatory equivalent response (the two debts are immensely disproportional, and the final judgment does not belong to the logic of gift as reciprocity, but goes back to the logic of *munus* or gift as dependence). In other words, the logic of gift as reciprocity offers a wider approach to the exercise of agency or, in Sen’s language, widens the horizon of people to reason about what is valuable for their wellbeing and for the good of those related to them.

To sum up, we have illustrated how economists have addressed the logic of the gift, a reality of human relations, within economic transactions. Economics of altruism have given a thorough account of agents’ behaviour beyond utility function. Still, it remains focused on the agent and the recipient rather than on the relationship between both. Following prestigious economists such as Genovessi, Smith and Sen, and underpinned by empirical discoveries of recent Game Economic Theory, Zamagni has illustrated, in more detail, the implications of the logic of the gift (as reciprocity) in economic relations. Zamagni’s theory has been adopted by CST in *Caritas in Veritate*, and it resonates with the logic depicted in the parable of *The Unmerciful Servant*. We have argued that, when we relate this logic with the CA, it can be inferred that the logic of

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<sup>415</sup> For a study of this logic mediated by Antonio Rosmini’s work, see Hoevel (2013).

<sup>416</sup> This is not the case in contractual relationships underpinned by the principle of strict retributive justice. For more about how relations shape our identity, see Part II/Introduction and Chapter 10.

gratuitousness: (a) generates ‘relational bonds’<sup>417</sup> that promote sustainable wealth and values; (b) widens the capacity of free agents to recognise themselves, hence to flourish, and enhances positive freedom, crucial to human development; and (c) fosters a novel understanding of justice. Justice as strict retribution, either seen as commutative or distributive, cannot grasp the idea, proposed by Sen, that processes of reducing injustices are effective only when they enhance people’s wellbeing, as will be explored in Chapter 12.

### 11.3. Reading the parable (III): back to the parable

The reading of the parable, after stepping back from it, depends on our reflections ‘outside’ the texts. It also relies on individuals’ and communities’ ability to discover ‘novel’ views of the text in relation to their life-situations. Therefore, we cannot predict nor explain in detail how the third and last movement of the analysis of the parable (back to the story) would unfold.<sup>418</sup> We can only point to what the reading of the parable could be like after having analysed the logic of the gift.

Firstly, readers could review the image of a God who transmits unconditional forgiveness to his servants and expects them to have a like attitude, but not exactly the same response. God’s attitude is flawless, but human gratuitousness cannot be perfect. Hence, readers could revisit their reactions regarding the parable’s finale, when the unmerciful servant is imprisoned for eternity because, in “justice”, he deserved it. Is this not suggesting a tendency to fail, especially in our capability of being merciful or gratuitous? Is this not the problem we encounter in present economics?

Secondly, readers could revisit their reactions and their identification with different characters and at different stages of the story. If the logic of the gift is an anthropological feature that even economists try to address, then it is worth discerning, in the light of the text, when this logic is present or absent in their relations. For example, is there any individual or communal economic behaviour that, due to its lack of gratuitousness, has triggered violence and anger, as the parable suggests? Or worse, in which financial situations have the readers found themselves being ‘Hobbesianly brutish’ for the sake of ‘strict-retributive-justice’ or order, or for the sake of defending the credit of the powerful?

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<sup>417</sup> For more on the ‘relational bonds’ in economics, see Bruni and Zamagni (2007) and Bruni (2012).

<sup>418</sup> For the method we use to analyse this parable: (i) a first naïve reading; (ii) stepping back from the text; (iii) back to the text, see Chapter 9.5. and the introduction of this chapter.

Lastly, readers may rediscover the richness and freshness of the parable in order to recreate stories with economic content that may counter the prevailing utilitarian ones. Enlightened by the Scriptural text, and with the help of the CST-CA analysis of gratuitousness, creativity may ensue. If, as argued before, the human mind is built to think in terms of narratives, and if these narratives not only move politics but also economics and markets, and if the confidence of individuals, companies and nations depend on them so as to develop (Akerlof and Shiller 2009:51-56), then the promotion of development/freedom and wellbeing/justice needs more than the 'invisible hand' story, or the 'self-made-man' fiction, or the 'trickle-down effect' fabrication, or the 'tough' business-development tale. These narratives are enshrined 'with a mythology, like that embodied in *The Apprentice* or *The Dragons Den* (ibid.:xiii), reality-show television programmes watched by billions of people worldwide, where a group of aspiring business-persons compete for the chance to work with, or to obtain credit from, business magnates. Although harmless in themselves, these stories and their underpinning mythology do not contribute to an understanding of freedom connected with wellbeing, and are contrary to the proposal of the CST-CA alliance.

As already mentioned, neither the CA nor CST on their own seem able to provide inspiring narratives to counter *The Apprentice* and the like, nor to excite transformation in the use of economic liberty inextricably linked with the wellbeing of all. Nonetheless, as argued in this chapter, the CST-CA combination can do so, particularly through the contribution of 'the logic of the gift as reciprocity', illustrated with the parable of *The Unmerciful Servant*. This logic, apart from countering the idea that in business the only reasonable attitude is that of retribution, stresses the importance of relational bonds, widens the capacity of agents to recognise themselves and to deploy their capability of being socially committed, and broadens the understanding of justice, all pivotal for development/freedom. Based on this contribution, the next chapter will study the parable of *The Workers in the Vineyard*, which emphasises more the idea of justice/wellbeing.

## 12. Wellbeing as Justice: *The Workers in the Vineyard*

So far, we have provided a framework for the dialogue on human-development between CST-CA using the parable of *The Sower*, and have developed this in terms of economic relations using the parable of *The Unmerciful Servant*. This chapter 12, the last of this Part-III, studies the parable of *The Workers in the Vineyard* (Mt 20:1-16) in order to focus the CST-CA dialogue more closely onto issues of justice/wellbeing. Although we have identified some points upon which CST and CA coincide and collide regarding justice,<sup>419</sup> this chapter seeks to avoid a term-by-term comparison, which would result in a mere juxtaposition of both the CA and CST propositions.<sup>420</sup> How to improve our capacity to be related to each other, particularly in economic transactions, is a question that the CST-CA alliance can answer more compellingly than either of the partners on its own. For the CA, the capability-centred idea of justice as *nyaya*, a practical, relational and agent-focused way of addressing injustices through continual public reasoning processes,<sup>421</sup> needs a partner that can give an account of the faith-based reasons. On the other hand, CST's theory of justice as a virtue, with aspirations to live in community, respecting and bringing good to each other, requires a partnership with believers from other religions, non-believers and secular-technical people, to ideate a better and more just way of being related to each other. Therefore, an interaction between CA and CST on issues of justice seems necessary if their ideas of justice are to find concrete solutions to present problems, at least in the limited scope of Catholic countries proposed herein.

We are aware that our 'conversational' approach is just an *introduction* to how the CA and CST can be combined while analysing justice/wellbeing. Our hope is that it will provoke thought and further inquiry, particularly with regard to those aspects of wellbeing/justice which can prompt more disagreements than coincidences. For instance, a longer elaboration of: (i) how the CA can respond to the notion of the Kingdom of God and the idea of justice that it brings; (ii) how a Thomistic teleological understanding of justice can partner with the CA consequentialist-procedural vision; (iii) how Sen's ideas on gender justice can impinge on CST's reserve on such topics; all seem to be crucial topics to be critically analysed in the near future. Also, considering the fundamental role of relations throughout our study, a thorough consideration of cultural issues influencing economic relations has been considered vital. However, limitations of space prevent us from analysing the cultural and controversial aspect of wellbeing/justice, something

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<sup>419</sup> See Chapter 8.

<sup>420</sup> See Chapters 8-9.

<sup>421</sup> See Chapters 7-8.

that would require a thesis on its own.<sup>422</sup> More precisely, and with regard to some specific aspects highlighted by the parable of *The Workers*, further investigation is required on: (i) the attitudes that hinder justice, such as ‘envy and arrogance’, and to what extent would a study of those attitudes based on a ‘virtue ethics’ approach help to advance the CST-CA dialogue concerning justice and equality?; (ii) other causes of injustices related to present economic relations.<sup>423</sup> Although some personal causes (e.g. envy or arrogance), the disrupting role of the logic of strict retribution, and some aspects of inequality and structural forms of economic injustice are highlighted in this and previous chapters, far more precise elaboration of these topics is vital so as to forge actual justice/wellbeing. For this to happen, a true conversation between representatives of CST and the CA is required. Ours is an attempt to imagine the dialogue within the framework of the parable of *The Workers*, investigating more how the CST-CA *coincidences* may help in interpreting the parable and generating a non-utilitarian narrative on justice/wellbeing.

After analysing the first impressions of the parable (first step of the method described in Chapter 9.5), we step back from the text (second step) exploring one of the main challenges of the story: how to shift the criteria to judge what is good (or just) from a mere proportional-retributive justice, common in calculative economic behaviour, towards a more wide and inclusive criteria. In other words, how the necessary economic comparative approach, whose validity the CA supports, may help to redress the inequalities generated by strict proportional-merit-reward justice, in which the already wealthy or gifted are better equipped to increase their wealth and gifts than the ones who lack them. But given that any attempt to foster equality tends to meet with strong resistance from the privileged, we also study how to counter those human attitudes that are undoubtedly disadvantageous to wellbeing. Finally, by going back to the parable (third step), we conclude that the idea of gratuitousness triggered by the notion of the Kingdom of God, in alliance with the CA view of freedom, equality and justice, can provide an alternative to the prevailing and limited narratives on strict retributive justice, for which there are deserving and undeserving poor (still unfree people), alongside rich and free people.

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<sup>422</sup> Other important aspects of the political-philosophical debate on ‘justice’ are not considered in our research. Still, the further investigation we are suggesting may need to address them. For example, the role of the judicial and the juridical processes from a theological, philosophical and legal-economic point of view (see Burnside 2011); the question of trade-off political power (see Walzer 1983); the advantages or disadvantages of social contract theories of justice (see Rawls 1971 and Ricoeur 2000) and their connection with the CA (see Nussbaum 2004); the liberal and democratic analysis of justice (see Nussbaum 2006), including the arguments against distributive justice (see Nozick 1974); the role of social, public and common goods (see Walzer 1983 and Olstrom 2010); environmental justice and its connection with Christian theology and the CA (see Northcott 2007 and Ballet et al. 2013), etc. Each of those topics also deserves a PhD in its own right.

<sup>423</sup> We have also mentioned the need for further research on the causes of injustice in Chapter 7.3.

Let us take a look at the text of the parable of *The Workers in The Vineyard* (Mt 20:1-16). Scholars agree that this is not just one of the most difficult parables to understand, together with the *Crafty Steward* (LK 16:1-12), but that it is relevant for the understanding of the Kingdom of God and of God's grace (Hultgren 2000). Some experts go even further: Jülicher (1963) defines the parable as the gospel in a nutshell, Montefiore (1927) thinks it one of the greatest parables of all, and Fuchs (1960) and Jüngel (1962) consider it the climax of Matthew (see Snodgrass 2008:362).<sup>424</sup>

<sup>1</sup> 'Now the kingdom of Heaven is like a landowner going out at daybreak to hire workers for his vineyard. <sup>2</sup> He made an agreement with the workers for one denarius a day and sent them to his vineyard. <sup>3</sup> Going out at about the third hour he saw others standing idle in the market place <sup>4</sup> and said to them, "You go to my vineyard too and I will give you a fair wage." <sup>5</sup> So they went. At about the sixth hour and again at about the ninth hour, he went out and did the same. <sup>6</sup> Then at about the eleventh hour he went out and found more men standing around, and he said to them, "Why have you been standing here idle all day?" <sup>7</sup> "Because no one has hired us," they answered. He said to them, "You go into my vineyard too." <sup>8</sup> In the evening, the owner of the vineyard said to his bailiff, "Call the workers and pay them their wages, starting with the last arrivals and ending with the first." <sup>9</sup> So those who were hired at about the eleventh hour came forward and received one denarius each. <sup>10</sup> When the first came, they expected to get more, but they too received one denarius each. <sup>11</sup> They took it, but grumbled at the landowner saying, <sup>12</sup> "The men who came last have done only one hour, and you have treated them the same as us, though we have done a heavy day's work in all the heat." <sup>13</sup> He answered one of them and said, "My friend, I am not being unjust to you; did we not agree on one denarius? <sup>14</sup> Take your earnings and go. I choose to pay the last comer as much as I pay you. <sup>15</sup> Have I no right to do what I like with my own? Why should you be envious because I am generous?" <sup>16</sup> Thus the last will be first, and the first, last '

<sup>424</sup> For further interpretations of this parable, see Snodgrass (2008), Söding (2009), Davies and Allison (1997), Donahue (1988), Herzog (1994), Jeremias (1972), Perkins (1981), Scott (1989) and Doyle (1994).

## 12.1. Reading the parable (I): first impressions

### 12.1.1. Great expectations for righteousness

The parable is carefully framed in two scenes. In the first one (vv.1-7), the master of a house<sup>425</sup> goes out to hire labourers for his vineyard. Although many details are missed out,<sup>426</sup> such as the reason why the master goes out himself and does not send someone else to do the recruiting, or why he keeps on going out till the last hour of daylight -despite knowing that the workers would not have time to produce much, one thing is clearly stated: he will pay the first ones the average daily wage: one denarius, and the rest of the workers he will pay whatever is right or just [δίκαιον<sup>427</sup>]. This is what generates great expectation in the listeners/readers.<sup>428</sup> What would this 'right/just' reward be like?

From this first scene we know that characters are introduced based on their mutual relationships, mainly the ones determined by a free market place (Söding 2009). Although some scholars (e.g. Herzog 1994) point out that Jesus is intending to denounce the unfairness of the labour market at the time, implying that workers were not actually free, others counter-argue saying that this assumption, however valuable, does not come from the parable itself (Snodgrass 2008:372).<sup>429</sup> Two facts of the story support the argument of denunciation. The first one is that the potential workers were desperately and helplessly waiting at the market place for someone to hire them, which suggests a kind of uneasy labour system, even to modern eyes. The second is the daily denarius wage, which depicts exploitative conditions. Indeed, one denarius was just subsistence pay at best. 'Usual estimates are that an adult in ancient Palestine needed about half a denarius a day to live and that an income of 200 denarii per year marked the poverty line' (Snodgrass 2008:370).<sup>430</sup> It is assumed that most workers were below or just about that line, because '200 denarii per year would hardly do more than keep a small family from going under'

<sup>425</sup> The man is defined as οἰκοδεσπότης (oikodespotē), manager or the one in charge of the economy of the house. As the translation suggests, he could be the landowner.

<sup>426</sup> Söding (2009) argues that these lacunae are deliberately introduced by the teller in order to raise the attention of his listeners.

<sup>427</sup> *Dikaion*.

<sup>428</sup> For Dodd (1961:19), the surprising points of the parables, as in the case of this one, does not negate the fact that listeners would recognise the stories of the parables as natural according to their circumstances and experiences (see Chapter 9.).

<sup>429</sup> CST has a strong tradition of claiming for the respect and rights of workers, as well as an in - depth socio-theological analysis about workers' rights and property rights, capitalism and socialism (see in particular *Rerum Novarum* and *Laborem Exercens*). However, given that the purpose of our thesis is to forge the dialogue between CST and CA, we are limiting the discussion to what we can find in this particular parable.

<sup>430</sup> As always, though, not everyone was poor. 'The rich "fared sumptuously", and the disparity between rich and poor was great and offensive, as it still is' (Snodgrass 2008:370).

(ibid.).<sup>431</sup> Precisely for this reason, the Torah mandated a daily payment, before sunset, because workers needed the money to survive (Lev 19:13; Dt 24:14-15).<sup>432</sup>

Regardless of these revealing cultural facts, the owner is not introduced as a villainous and cruel employer. On the contrary, he goes out and hires workers -even if they may not have been needed. Moreover, he does not take advantage of the wage agreement nor of the workers themselves, and he ends up paying more than anyone expected, for which reason he is regarded as 'good' (v.15).<sup>433</sup> Therefore, given the importance of the role of the landowner in the story, one can argue that the parable does not suggest an explicit rejection of a particular system. If this were the case, we would need to question the last part of the parable, as Herzog (1994) does, by stating that Matthew had created a 'theology', hence diluting the true social protest implicit in the parable. But had Herzog been right, then 'most people would have to give up any hope of understanding Jesus' parables... for nothing provides a bridge from the text to any of... [his] conclusions... Herzog's approach is an example of laying the culture over the text, rather than letting the text lie in its culture, and then bending the text to one's own ideology' (Snodgrass 2008:372-3).

Rejecting interpretations that consider the parable as a fundamental channel to social revolution does not deny the parable's challenge to the prevailing notion of justice of that time (and of ours too). But the challenge must be found from inside the parable, which we need to continue reading with the method we have selected.<sup>434</sup> We know so far that there is an element of freedom involved in the labour relationship, freedom blurred by cultural conditionings. We also know that great expectations have been triggered by the uncertainty of the payment to the later workers. According to the principle of proportional justice, they should receive less than the first ones. Although something is better than nothing in their desperate situation, less than a denarius would be insufficient to feed their families that day. What is going to happen next?

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<sup>431</sup> For more on the value of ancient Palestine currency and an eventual comparison with today's currencies, as well as issues with labour wages at Jesus' time, see Fienzy (1991:86-90); Heichelheim (1959); Stegemann and Stegemann (1999:81-93) and Scott (1989: 290-91).

<sup>432</sup> We find similar indications in rabbinic writings (see Snodgrass 2008:370).

<sup>433</sup> According to Thomas Aquinas, 'good men are so called chiefly from their justice' (*Summa Theologica* II-IIae,q.58,art, 3).

<sup>434</sup> See Chapter 9.5. We find an analogy in this approach to that of Sen. Challenging the prevailing notion of justice in order to forge social transformation, but without promoting explicitly a social revolution, and without disregarding completely the way society is already organised, seems to be the approach of both the parable and TIJ.



### 12.1.2. Starting from the last: an unwelcome surprise (the eschatological reversal)

In the second scene (vv.8-15), listeners are surprised beyond expectation. The last workers are summoned first, and they received a full day's payment, even though they had only worked for one hour. Nothing is said about the rest of the workers, those who had worked for a couple of hours only. There is an implication that all of them received their payment and went off, probably pleased at having received more than they deserved by custom, more than they had expected, but just enough to subsist for the day. The silence about the feelings or reactions of those workers is significant, a reason why some scholars tend not to think of it as a parable of 'joy' or 'grace' (Snodgrass 2008:375-6). Indeed, the 'in-between' workers did not receive any explanation of their payment, nor any moral suggestion that they should do likewise in their own economic affairs. The only implicit extra mention of them is at the very end, when Jesus says that, in the Kingdom of God, the last will be the first (Söding 2009). This eschatological reversal is, in principle, anticipated by the payment the last workers got.

Back to the story; the parable moves straight onto the first workers, who have been witnessing the whole saga. According to a common sense of justice, they have reason to believe that, if this master is so generous that he pays one denarius to those working just a few hours, then he will pay them with similar generosity. Both listeners and the first workers presume that an increase in their payment will occur (v.10). But they are totally disappointed: the last workers receive only the agreed denarius. For them, this is not merely an unwelcome surprise, but a flagrant injustice. Their protest (or grievance) is not based on abstract principles of justice, but rather on the master's actions, who has made the last workers 'equal to [them]' (v.12) (Söding 2009). This breaks the logic of the connection between work and reward. For listeners, this also shatters the logic of the affinity between their notion of justice and what Jesus is introducing as God's ideas (Ferrar Capon 2002).

### 12.1.3. Protests and the final judgement

The workers have sound reasons to protest, and both they and the listeners are expecting a response that can redress the matter (Söding 2009). The master finally speaks out, addressing only one of the early labourers. First, he asserts that there was no injustice whatsoever. If justice is to give to people what 'is theirs',<sup>435</sup> what corresponds to them (vv.13-14a), then he has not wronged the first workers, who received their promised and well-deserved denarius.

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<sup>435</sup> See Aristotle, *Nicomachean Ethics*, IV.1 and Thomas Aquinas, *Summa Theologica* II-IIae, q.58, art. 1. The latter, based on Aristotle, defines justice as 'the habit whereby a person with a lasting and constant will renders to each his due'.

Secondly, as the owner and master of that house, he explains that he has the right to use his goods in the way he considers appropriate (vv.14b-15a). Free market operations require free will to dispose of one's wealth. However, the master is not implying that he can literally do whatever occurs to him with his property, an ultra-liberal argument. Because he is defending himself against the accusation of doing wrong or acting unjustly, it would be a contradiction in terms to argue that he can do anything, even unjust things. In Sen's language, he is explaining that he has reasons for acting as he did, reasons that could be scrutinised publicly, as he had not undermined anyone's wellbeing. On the contrary, his actions, in his mind, have been 'good' and have helped people to increase or at least maintain their wellbeing.

The third and last argument is, for many (e.g. Sooding 2009, Snodgrass 2008), the most important of all, because it goes straight to the point and impacts on the feelings of both workers and listeners. The master, aware that doing 'good' or acting 'rightly/justly'<sup>436</sup> does not only promote wellbeing, but can also provoke envy or jealousy, asks a direct question: 'why should you be envious because I am generous?' (v.15b) In fact, a literal translation would read: 'or is your eye evil because mine is (I am) good?'<sup>437</sup> This suggests that giving to the last-workers more than everybody had predicted was a *good* action, even though there was *no proportion* between the work done and the payment received. Conversely, the early-workers' protest about 'making them equal to the last-workers', although based on an idea of *proportional justice*, was *wrong*, because it was driven by envy.

In other words, the first-workers' envious *cry of indignation* is not provoked by an unjust situation, but rather by a just one. Normally, as Ricoeur (2000:xi) explains, a just cry of indignation is associated with situations where promises are betrayed (e.g. unfulfilled contracts to workers, or unfulfilled payments to retired people, or unfulfilled care for elderly or disabled persons), or where shares are distributed unfairly (e.g. the cry of a child when her sibling receives a larger slice of birthday cake, or the cry of the 'indignados' in Madrid, New York and London when, in the aftermath of the 2008 world financial crisis, those who fomented the crisis ended up better-off than those who are still suffering from it). However, the first-workers' *cry of indignation* against the landowner is neither based on betrayed promises nor on unequal shares, but rather on an action that has triggered equality! Hence, their protest is motivated by what

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<sup>436</sup> The editor of the parable plays with the Greek words: δίκαιος (right or just) (v.4) and ἀδίκῳ (wrong or unjust) (v.13) (Söding 2009).

<sup>437</sup> Evil eye is an expression that describes envy, or jealousy, or lack of generosity, present in the Old Testament. For example, Prov 28:22 links an evil eye with greed, whereas the person with a good eye gives his bread to the poor (Prov 28:29) (Snodgrass 2008:376). An evil eye cannot see anything 'good' (Brosend 2006:64). For Aquinas, who follows Aristotle, 'the very mention of envy denotes something evil' (*Summa Theologica* II-II, q. 58).

Aquinas (*Summa Theologica* II-II, qs.23;46;158) calls 'evil anger', as opposed to 'holy indignation' (or righteous anger) for the right reasons, coming from a sense of actual injustice, from what Sen (2009) calls a reasonable movement or emotion towards the desire to reduce injustices.<sup>438</sup> In sum, the outcry of the first-workers, despite being grounded in proportional justice, is the reversal of the sense of justice.

At this stage, the first workers and listeners find themselves in a truly uncomfortable situation. On the one hand, they still feel a sense of unfairness.<sup>439</sup> On the other, they are implicitly accused of being unjust themselves! Is Jesus reversing values such as proportional justice, or just rewards? Worse, if this parable has an eschatological reference, is the work of human hands irrelevant to God's grace and judgement?

Followers of Jesus may feel further puzzled with these questions, because they know Jesus's proclamation of the Kingdom had not excluded rewards, or suggested them as something wrong *per se*. Indeed, 'reward' is also a way 'to talk about what pleases God and assures that following Christ is not a fruitless endeavour' (Snodgrass 2008:377). Moreover, the disciples themselves, like most humans, 'were into calculating reward and seeking privilege' (ibid.). Peter's question about the reward for following Jesus in Mt 19:27 (a few chapters before this parable), was not dismissed but rather justified (Jesus promised a great reward on earth and in heaven). However, what Jesus did reject is a reward that creates status or ranking among the members of the kingdom, reflected in his rebuff of the sons of Zebedee's request about sitting on the right and left of his throne (Mt 20:20-28). Jesus' uneasiness with these types of rewards is closely connected with two key sentences in the parable. The first one being the one which highlighted

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<sup>438</sup> This specific aspect of the parable is particularly interesting for the CST-CA dialogue. Indeed, as explained in Chapters 2, 3, 7 and 8, for both CST and the CA, the ideal starting point of an idea of justice is any unjust situation which provokes a *cry of indignation* that, although unsophisticated and occasionally confusing, is crucial to move one towards discernment and action. But it is also relevant for today's economy. For instance, while this thesis was being proof-read, a best-seller by the French economist Thomas Piketty (2014) triggered a row over capitalism and inequality. After the editor of the Financial Times, Chris Giles (2014), discovered some inconsistencies in the data used by Piketty regarding inequality in Britain from 1970s to present, many involved in political-economics *cried with indignation* against Piketty (see blogs and posts of the referenced articles). Yet, another economic researcher published an article in The Guardian supporting Piketty's argument, and clarifying that the reason for Gilles' disagreement was the differences in the analysis of multiple sources of economic data, particularly regarding issues of discontinuity (Reed 2014). Arguments on statistics aside, it is notable that some people are more interested in destroying Piketty's reputation rather than discussing the evident rising inequality, previously highlighted by several studies, such as those of the Nobel Prize winner and former Chief Economists of the World Bank, Joseph Stiglitz (2013). Likewise, and from a personal pastoral perspective, it is not unusual to witness Catholic parishioners being indignant when some 'sinners' are accepted into the community or receive holy communion.

<sup>439</sup> History of the effects of the parable shows that listeners/readers are not convinced with the solution the parable offers, and that a sense of internal groaning remains in many (Söding 2009).

that those hired first thought and expected they would receive *more than the rest* (v.10); the second, when they protest because the master ‘*equalises*’ them to the rest (v.1).

## 12.2. Reading the parable (II): stepping back from the text

Listeners who find themselves in this uncomfortable situation, being bewildered by Jesus’ remarks which seem to turn upside down their ideas of justice, would need to step back from the parable, re-meditate on the teller’s intent and link it to their life-experience, and finally come back to the text again.<sup>440</sup> One of Jesus’ intentions, presumably, is to push listeners to their limits with regard to their notion of ‘just rewards’. The reason listeners tend to identify themselves with the first workers and perceive the master’s action as unfair, at least interiorly, is because their reasoning is confined to the ‘commitment-merit-reward’ logic (Söding 2009). Under it, the gift of the master to the last workers sounds like an arbitrary donation, proper to a rich man who is used to doing with his wealth as he wishes, and who is not used to being restrained by material limitations. Is this what the kingdom of God is like? It cannot be; the parable must be wrong, or must have a different meaning.<sup>441</sup> The last question about why they are ‘envious because [the master is] generous’ could be interpreted as a condemnation, which will bring the story to a close. If this were the case, listeners would have the right to doubt the meaning of the parable altogether. Instead, such a question could be seen as open ended, offering a new horizon to the listeners, as if the story invited them to a real transformation or conversion (*metanoia*) (ibid.),<sup>442</sup> particularly regarding their understanding of justice.

### 12.2.1. Criteria to judge

For any notion of justice, as well as for any juridical process, one of the crucial topics is how to ‘judge’ what is just or unjust (Burnside 2011:103). The parable echoes this by questioning the way we ‘judge’ others, the criteria with which we decide what is just or unjust, and links it with how we bring about good to others (well-being).<sup>443</sup>

These criteria vary according to different theories of justice and their rationale (see Campbell 1988, R.L. Cohen 1986 and Brighthouse 2004). The prevailing criterion of the original listeners to the parable, presumably Israelites,<sup>444</sup> is depicted throughout the Old Testament. According to

<sup>440</sup> This is the method we have selected for the analysis. See Chapter 9.5.

<sup>441</sup> This is the interpretation of Herzog (1994), for whom the master cannot be ‘good’. Surprisingly, however, Herzog does not include in his analysis any parable where the authority is clearly ‘good’, as happens with the Prodigal Son. For Snodgrass (2008), this reveals the flaw in the argument, imbued by ideology.

<sup>442</sup> For more on the theological meaning of *metanoia*, see (Ratzinger 1987). For the revolutionary implications of *metanoia* in the political arena, see Davis and Riches (2005).

<sup>443</sup> For our explanation of ‘justice and/as wellbeing’ according to the CA, see Chapter 7.

<sup>444</sup> The Gospel of Matthew is chiefly addressed to Israelites (Jones 1995).

the profound study of Burnside (2001:103-115), the main features of the biblical criteria for justice could be summarised as follows:

- (i) God is the ultimate source of justice (Dt 32:4), who makes distinctions between light and darkness, order and chaos, good and evil (Gn 1:1 -2:3). Distinctions differ from divisions. While the former are based on the natural gift of creation and are a pivotal condition for creatures to share space, time and life, divisions are socially construed and bring confusion among creatures, impeding them from sharing and actualising their potential to develop (cf. Gn 11:1-27). Thus, in order to promote a good life, God distinguishes between the liberating power coming from him, and the oppressive power coming from the Egyptian pharaoh (Ex 4; 7), and consequently fights to overthrow the oppressor and liberate the oppressed (Ps 72:4; 82:3; Is 32:1-2 cc.);<sup>445</sup>
- (ii) Kings and judges are supposed to model themselves on God's behaviour (Dt 16:20). But 'judge' is not limited to kings or professional adjudicators (e.g. Moses -Ex 18:19-, or judges in Jerusalem 2Chr 19:11), because Moses transmitted this function to the whole of Israel (Dt 1:16-17), and all Israelites were required to approve the laws and judgements presented to them by God (Ex 21:1), and also all of them were instructed in the law and statutes (Ex 24:12; Dt 17:10-11; Lv 10:11). Thus, biblical justice is more a communal responsibility than an individual virtue or a system to defend individual rights, more a vocation for all Abraham's descendants (Gn 18) rather than an elitist idea for a few;
- (iii) In order to promote justice more concretely, Israelites were asked: (a) to sort out their own legal disputes when possible, (b) to respect the position of local or provincial courts,<sup>446</sup> and (c) to participate in the processes of justice (Dt 17). Indeed, the fact that the source of justice is God does not mean, for the Bible, that justice is not humanly mediated. However, in order to effectively promote justice, the Israelites were asked to apply a practical wisdom (*hokhmah*) (Prov 2:6-8), a kind of mental capacity or common sense, either in politics (1King 2:9), judicial discernment (1King 3:12), or personal perception (2Sam 14:20).

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<sup>445</sup> The verb 'to judge' (*shapat*) means, among other things, to save the oppressed from the hands of the oppressor (Burnside 2011:107; Weinfeld 1995:40). Further ahead we explain how the parables comprise this idea of judging as liberating (see 4.2.3)

<sup>446</sup> Provincial courts were not subordinate to a kind of Supreme Court, which is an astonishing precedent of CST of subsidiarity. For more about this principle, see *Compendium* 185-188.

These criteria are what Jesus is trying to recall and interpret in order to help his listeners walk through the paths of *metanoia* concerning their idea of justice. In this sense, they are vital precedents of the parable of *The Workers* and of CST ideas of justice, for which justice can never be limited to 'just rewards'. We find some surprising, though remote, coincidences of ancient biblical justice in the CA. First, the 'grass-root' and participatory idea of justice. Secondly, the notion of respecting local justice but still going beyond parochialism and beyond formal ways of advancing justice. Thirdly, the fact that in order to do justice, a special mental capacity or discernment is required, or what Sen would call reasons that can be publicly contested and approved. However, the clearest dissimilarity is the fact that God is the source of justice, and that in order to advance it people should emulate God's revealed just attitudes. Still, this fundamental difference could be smoothed over if theology could provide reasons to value what believers consider God-like just behaviour, as suggested in previous chapters<sup>447</sup> and will be furthered below.

Assuming for the moment that CST can provide reasons for public justice beyond their religious beliefs, we still need to put in perspective this fundamental criterion of justice championed by the CA, i.e. give reasons to others for our choices. While it is undoubtedly one necessary step, it is not enough to help justice progress, as explained in previous chapters.<sup>448</sup> How to address different values people hold seems to require further elaboration than a public reasoning process, precisely because reasons in those processes can (and often are) contestable, as is the case of the source or aim of justice.<sup>449</sup> Likewise, an understanding of justice based on a

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<sup>447</sup> See Chapter 7, where Sen's *Idea of Justice* (TIJ) was explained and Chapter 8, where we identified the similarities and dissimilarities of CST and CA. See also Chapter 10, where we discussed how an interaction between CST's idea of relationality seem to match some reasons for free development according to the CA, and Chapter 11, where reasons based on CST brought light to the discussion of how to give account of gratuitous behaviour in economic transactions.

<sup>448</sup> See Chapters 7.2 and 7.3.

<sup>449</sup> This topic leads us to the debate about the foundation of the reasons people value in order to foster justice through public reasoning processes. In this line of argument, Paul Ricoeur (2000:36-57) questions whether a purely procedural theory of justice, championed by both Sen and Rawls, is ever possible. By critically analysing Rawls' *Theory of Justice*, he concludes that a purely procedural theory of justice cannot make sense without any presupposition of 'the good', something that CST could argue against the CA/TIJ. According to Ricoeur, despite Rawls' monumental effort in connecting the Kantian deontological primacy of 'the just' over 'the good' with contractualist theories, people in the 'original position', covered by a 'veil of ignorance' about their eventual future position in society, still need to be imbued with the principles of justice. In particular, they would need the principles that Rawls describes as the foundation of his entire theory. These are: (i) an egalitarian principle: each person to have an equal right to the most extensive basic liberty compatible with a similar liberty for others; and (ii) a non-egalitarian principle: social and economic inequalities to be arranged so that they are both a) reasonably expected to be to everyone's advantage, and b) attached to positions and offices open to all (Rawls 1971:60). But, according to Ricoeur (2000:56), those people in Rawls' original position need a kind of 'pre-understanding of the unjust and the just' in order to make their decisions, a reason for which the Kantian-deontological approach Rawls follows ends up, paradoxically, as in a circle, depending on a sort of Aristotelian-teleological approach, such as the Golden Rule present in many and different cultures throughout centuries (do

pure and perfect teleological idea of justice, which belittles people's reasons to value certain things that do not necessarily match with the *telos*, and which side-lines the imperfections of the processes to achieve it, seems also an incomplete approach to justice, as Sen (2009) contests. Some of these criteria for justice, starting from the Old Testament ones, are challenged and put to test by the parable of *The Workers*.

While sympathising with the first workers, many listeners reveal that their criteria is still under the logic of 'strict retribution', for which 'others' deserve a wage, or a benefit, or something, in so far as they give something proportional in return. This applies either to commutative justice (the exchange between individuals) or to distributive justice (the exchange between individuals and the state).<sup>450</sup> Therefore, to do justice, hence to enhance good, is to respect the reciprocity in the interchange of relations, especially in economic operations. But it is precisely this understanding of justice that the last scene of the parable questions. It does so by introducing a double challenge to listeners, as suggested above. The first challenge is related to the content of the conversion: how to conceive justice beyond the logic of retribution, yet without belittling the whole notion of 'just rewards'? The second challenge is more about the person that requires a conversion: how to go back to the parable, the ending of which feels more like an expulsion than an invitation? Are those who feel sympathy for the first workers condemned by Jesus? Are they to be expelled from the Kingdom?

A first honest reflection, as Söding (2009) suggests, would be to accept that in the course of our lives, we have not been treated only according to the logic of strict retribution. Every single being has received gifts that do not correspond to a specific merit (an un-proportional<sup>451</sup> present). If we discover some of these riches that have shaped our existence, we will be better equipped to go back to the parable and see if we still feel disturbed by the un-proportional payment the last workers received. When this occurs –the argument continues, the parable will be completed, because the *last* (in this case the unconvinced listeners) will become *first* (now convinced that a logic that goes beyond strict retribution is possible when dispensing justice).

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not do to others what you would not want to happen to you). The arguments of this debate exceed the scope of this Chapter. Still, as indicated in the Introduction of this Chapter, more investigation on this particular topic is required so as to further the dialogue between CST and CA/TIJ, particularly because both Sen and Rawls's idea of procedural justice are an attempt to argue against utilitarian justice, a motivation that concurs with CST (see Chapter 8).

<sup>450</sup> For the distinction between commutative and distributive justice, see Thomas Aquinas, *Summa Theologica II-II*, Q 61.

<sup>451</sup> We prefer 'un-proportional' to 'disproportionate' or 'disproportional', because the latter adjectives, in English, suggest a too large or too low proportion between two things (Oxford English Dictionary, 2005). Here we are not necessarily stating such disproportion, but only referring to the lack of proportion or parameter between deeds and rewards. Yet, 'disproportional' is used when, according to the context of the sentence, this subtle distinction is not required.



They will not need to compare themselves with others any longer, not because comparisons are wrong *per se*, but because the 'gift' will have *equalised* them to the rest. Equality, 'ever since Solon, Pericles, Isocrates, and Aristotle... has been a synonym of justice' (Ricoeur 2000:77). However, this equalisation does not seem to be about absolute equality (Snodgrass 2008), something that other parables confirmed (e.g. in the previously analysed parable of *The Sower*, some terrains were able to produce more fruit than others).<sup>452</sup> What is at stake is the criteria with which we judge the goodness of others, a fundamental dimension of justice for Jesus.<sup>453</sup> Given that most of us struggle to include 'goodness' within 'justice', the parable offers a way out: the logic of the joy of 'giftedness'.<sup>454</sup>

### 12.2.2. Criteria to compare

We have extensively explained what the logic of the gift is and how it can operate within economic relations.<sup>455</sup> What can this parable add? We have seen so far that the denarius paid to the last workers, although not excessive (just enough to survive for a day), is certainly out of proportion, because in the case of the last workers, labour hours do not correspond to labour wage (at least in comparison with the first workers). Because the first-paid workers and listeners felt unease at this disproportional gift (they consider it unjust), the master gives a sound account that there is nothing unjust about it. In addition, by questioning their uneasiness, he also implies that those who reject this idea of justice-goodness that goes beyond the logic of retribution, should revisit their criteria for judging economic deals via comparisons.

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<sup>452</sup> From this particular topic of the parable (all the workers receive one denarius), a further explanation and analysis of the difference between arithmetic and proportional equality is required, because it is essential to understand the basis of distributive justice (Ricoeur 2000:57). Unfortunately, due to limitation of space, we cannot address this discussion. We rely on Snodgrass' argument, in the sense that the parable is not referring to arithmetic equality, thus it is neither denying a theory of proper distributive justice nor suggesting that a literally-absolute equality of income is necessary for the promotion of justice. The fact that the notion of justice fostered by the parable is not necessarily arithmetic, coincides with the CA notion of equality, not based on a fixed parameter of strict equalisation, but rather on the dynamic parameter of people's capabilities, clearly different for every single person (see Chapter 6.3). It also concurs with the general idea of 'distributive justice', which aims even in its more radical expression of political egalitarianism, to free a society from domination, not to repress it through the imposition of absolute equality (Walzer 1983). Indeed, according to Ricoeur (2000:78), 'only a repressive society... could impose such equality, and it would be to everyone's detriment' rather than to everyone's wellbeing.

<sup>453</sup> For Jesus, as a faithful Jew, 'to judge' (*shapat*) others is equivalent to save them from their oppression (Burnside 2011:107). It comes as no surprise, therefore, that with this parable he claims for an understanding of justice that goes beyond the logic of retribution. Under solely this logic, how can an enslaved person deserves freedom? Or how can a rich pharaoh/king/people deserves to be less prosperous?

<sup>454</sup> This logic, at least as it is introduced by the parable, does not ignore the possibility of 'wrongness' when applying justice, i.e. human ambiguity or sins (see Chapters 2-3). Precisely because all workers are paid justly, and because all of them would have the minimum wage so as to live for that day, the master of the parable does not consider he has done something wrong that could negatively affect other beings. Through his defensive arguments, one can deduce that he is well aware of 'wrong-doing'. Moreover, in his question to the first workers about envy, he also seems to be aware of their capacity to sin.

<sup>455</sup> See Chapter 11.



Comparisons based on strict-retributive justice could be useful, but seem to be insufficient to judge the ‘goodness’ of economic agreements. Indeed, the ‘gift’ (the denarius they all received) is a ‘good’ element in common, upon which agents can build up communal relationships as equals. These relationships cannot avoid comparisons, even less so in economics. In fact, as Sen argues (TIJ), comparing the state of affairs is pivotal for any programme aiming at enhancing freedom and justice. Yet, when the only way of comparing humans is the ‘proportion’ between merit and wages, then our idea of justice is limited.

Snodgrass (2008:377) gives further account of this by explaining that ‘humans, then and now, are continually comparing themselves with others, trying to assess fairness and level of accomplishment’, as the first hired workers and listeners of the parable -as well as Jesus’ disciples- do. But the only fact that causes the workers to complain is the comparison of their wage with that of those hired later. ‘As with most humans, justice is, in their eyes, that which gives no one else –not even the poor- an advantage; it is defined from a self-centred perspective’ (ibid.).<sup>456</sup> Therefore, a different criterion of comparison that allows us to equalise with others can free us from the burden of misjudging people according to a strict abstract and predetermined criteria. Justice in the Kingdom comprises doing ‘good to others’, exceeding mere ‘proportion’. An idea of justice attuned with God’s Kingdom cannot be deployed by disadvantaging those already disadvantaged. When the exercise of strict proportional or merit justice is detrimental to the underprivileged, then it needs revisiting. This approach can also liberate us from judging what is fair merely according to self-advantage, because, as Snodgrass (ibid.) argues, ‘for most of us, injustice is what happens to our disadvantage, while what happens to our advantage is good luck’, and we are reluctant to admit that, occasionally, self-advantage could be unjust.

### 12.2.3. Shifting criteria

How to shift from an idea of justice that seeks our own advantage towards a more inclusive one?<sup>457</sup> The process is not an automatic one, as Söding (2009) warns us. From the parable we can infer at least two lines of thought. One comes from the context of the parable within other parables, and consists of the mission the disciples (those who first accept living in the Kingdom)

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<sup>456</sup> This is one of the main reasons Rawls’ theory of justice, partially praised by Sen (TIJ:53-65), stresses the need for the ‘maximin’ principle. Through this principle, citizens should tolerate inequalities in so far as they help maximise the minimal share, i.e. that economic inequalities need to be arranged so that they benefit the least advantaged (Rawls 1971:302). What Sen disputes is, among other things, that the measure of economic inequalities cannot be restricted to resources -even if these are primary resources-, but rather be based primarily on capabilities (see Chapter 6.3). As explained in Chapter 12.2.4., the capability-metric, for Sen, is better ‘because its focuses on ends rather than on means’, and can, for example, ‘better handle discrimination against the disabled’ or any person who is not fairly treated within a strict-proportion-merit logic of distributional justice (TIJ:263).

<sup>457</sup> Rawls has devoted his entire life to trying to answer this question (see Rawls 1999).

have concerning liberation. The second one comes from the text itself, and it is about the presence of God's grace through the logic of disproportional gifts applied in human relationships, particularly in economics.

Firstly, from the context of the parables, we can deduce that Jesus is the one who distributes unmerited gifts to people such as prostitutes, tax collectors, lepers, unproductive workers, or sick persons. But Jesus can only count on the openness of heart of those who listen, invite them to follow him, and transform their own and their surrounding reality. If followers are expecting to receive more than others, based on their own merits, or aim at having privileges over others that can foster advantage for them or the groups they belong to, then the grace of the Kingdom is limited in its effect. But when followers can include the logic of the 'out-of-proportion' gift, then creative relationships can ensue from their mission.<sup>458</sup> These followers are expected to help others enter into this logic too, not by imposition but by proposition, which seems the proper way to enhance liberty and agency. Yet, theologically speaking, their success would depend on God's grace rather than on their own strengths and wisdom; or put better, it would depend on the way God's grace can inform their capacities, ideas and projects. But how can God do that? This question leads us to the second proposal we can deduce from the parable to help us transform our criteria in evaluating justice. Where can we find God's liberating and reinvigorating presence in the story, hence in economic life?

The parable implies that the call to live in the Kingdom (i.e. to live well) is based on a disproportionate and unmerited gift, which means it does not depend on people's previous merits. Hence, everyone, even the un-merited or untalented agents, can and deserve to pursue a good life. The *lasts*, in this Kingdom, are not called to remain last, but to become like the *firsts*. Yet to do so, they would need to be equalised to the others in gifts. An initial reading of the parable would suggest that God, representing the master, is the one in charge of directly equalising the 'lasts' with the rest. But is he? If he were, then we would need to find an explanation that reflects this direct intervention in real economic life. However, due to endemic inequality (Stiglitz 2013), the only explanation would be that, either God has forgotten to intervene, or that his intervention concerning equality is of a different and more profound sort altogether. For example, we can argue that God has created us all equal in dignity (*Compendium*, 144), and that it is up to us to respect and express such equality in economic affairs. Although this theological explanation has undoubtedly an element of truth, on its own, it does not sound convincing. Firstly, because it implies an image of God who establishes our world, gives humans

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<sup>458</sup> In recent declarations, Pope Francis has revealed similar line of thought. See the article written by the Italian journalist Eugenio Scalfari: 'The Pope: How the Church will change'. *La Repubblica*, 01/10/2013.

some gifts, and then decides to distance himself from it and watch humans' performance from afar. This is in contrast to the image of the parables of the Kingdom, where God is involved in our realities and guides us through our ambiguities. Secondly, even a refined theory of on-going Creation-Redemption (i.e. God constantly recreating us and gifting us with his Spirit, by means of which we are equalised), sounds hard to transmit to those who are suffering for being 'the last' (*Compendium*, 145). How can we convince Araceli and Gustavo, who live in the slums of Buenos Aires, that they are equal to the people living in the City of London? Surely there must be another explanation of how God equalises humans through the gift of his grace.

A closer examination of the parable confirms that we cannot identify the master with God and the denarius with 'grace'. Because, theologically speaking, if God's grace is abundant, then the not-so-generous denarius (just a survival wage, Scott 1989:282; Snodgrass 2008:375), cannot represent it. Likewise, if the denarius is not 'grace', the master is not necessarily God. How then is God represented in the parable? How does he deploy his transforming, liberating and equalising grace? According to Söding (2009), God's grace is represented through the *mediation* of economic deals that, by deploying the logic of disproportion or gift, can promote justice through some sort of equality. In other words, although the denarius in itself does not represent God's grace-gift, because is not an excessive or abundant wage, it does insinuate that, applying goodness in economic transactions through a logic of 'giftedness' (gratuitousness), is a way God has selected to deploy his grace and promote justice. But is this possible? How can we imagine that a 'peculiar' equalisation of gifts in economics can promote justice and enhance peoples' wellbeing? In this terrain, theology falls short in giving appealing answers. Yet, with Sen's CA help, we argue that sensible proposals could emerge.

### 12.2.4. God's justice-equality criterion and capabilities

#### *Inequality matters*

There are two fundamental questions about equality. The first one is why does equality matter? The second is what kind of equality are we talking about, or better, are we seeking? Theologically, equality matters because, as said before, we have been created in the image and likeness of God. This gives us a special dignity, a similarity to God which is a universal gift. All humans deserve to be treated according to this gift-dignity.<sup>459</sup> Given that inequality 'compounds, and often stems from, discrimination based on gender, race, or caste' (Green 2008:3), it is something that corrupts human dignity and distorts the gift-Grace received by everyone. Economically, equality matters because it is good for growth, for the reduction of poverty, and for sustainable human development (Stiglitz 2013). Inequality,<sup>460</sup> as Green (2008:5-6) explains:

- (i) wastes personal and social talent (e.g. women excluded from top jobs prevents a nation or group being enriched by their approach);
- (ii) undermines social institutions (e.g. when a vast number of workers are excluded from the formal sector, hence from unions and labour laws, these institutions, once designed to safeguard the unprotected powerless labourers, are blunted);
- (iii) erodes social cohesion (e.g. deep inequality among social classes, known as vertical inequality, is connected with a rise in crime);
- (iv) limits the impact of economic growth on poverty (e.g. in Haiti, one of the most unequal countries in the world, a one per-cent increase in PBI would have much less

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<sup>459</sup> As stated in Chapter 3.2.2., for the Gospels, in particular for Lk, extreme inequality is a recurrent evil that starts with indifference to our neighbours, whether impure, oppressed by demons, sick, paralytic, adversaries, excluded, wounded, relatives, poor, lost, indebted, vulnerable; etc. CST has stressed the importance of equality as a legitimate aspiration for wellbeing and justice (*Octogesima* 4.22; *Gaudium et Spes* 29.31).

<sup>460</sup> Literature on present global inequality and proposals on how it can be reduced abound. For a thorough explanation of how inequality has dramatically risen in the last thirty years in the US, see Noah (2013). / For the danger of actual inequality in the present economic system, see Stiglitz (2013) and Galbraith (2012). / For a critical analysis of current financial-development model and its moral and social impact see Lansley (2012). / For a historical and structural explanation of the present inequality, see Dorling (2011). / For a thesis against inequality as a sign of social instability and psychological distress, see Robert and Edward Skidelsky (2012) / For a proposal to combat global inequality through taxation, see The Tobin Project [online] / For an overview on the current theoretical and empirical research on the topic, see Salverda et al (eds.) (2009). / For the relationship between equality and health, see Wilkinson and Pickett (2010). / For a scientific explanation on the impact of globalisation on inequality, using the 'mechanism design theory' (on institutional mechanism on economics), see Kremer and Maskin (2006). / For the impact that income inequality has on social mobility, fertility rates and access to education, see Corak (2012). / For a synthesis of different systems to measure inequality, see Foster (2006) / For a Catholic theological consideration of equality and inequality, see Pieris (2013). / For a recent and controversial study on the history of capitalism and the growth of inequality, see Piketty (2014). This list could be enlarged substantially. The aforementioned titles are merely an illustration of the importance of this topic in economics, political philosophy and sociology.

impact on poor people than it would have in Norway, one of the most equal countries in the world)<sup>461</sup>; and

- (v) transmits poverty from one generation to the next (e.g. *villa*-dwellers in Buenos Aires, in comparison with ordinary citizens, have an extraordinarily high percentage of undernourished children).<sup>462</sup>

Far from being prescriptive, this list of socio-economic effects due to inequality can be easily enlarged. No wonder institutions such as The World Bank and United Nations are gradually emphasising the need to combat inequality (ibid.3;5).<sup>463</sup> But is the theological equality-dignity-gift the same as economic-income oriented equality in economics? Paraphrasing Amartya Sen, when we talk about equality, we are talking about *equality of what?* (Sen 1980, 1992).

### *Measuring inequality: capabilities and the logic of the gift*

For Sen, as explained in Part I and Part II,<sup>464</sup> equality is not merely about income, resources or opportunities, but about capabilities or freedoms. Sen has re-examined the notion of equality/inequality beyond a mathematical approach within economics (1992).<sup>465</sup> Moreover, through the lens of gender, Sen (1999) has delved deep into the question on which *kind of equality* political-economics should be seeking. The new global scenario, he argues, needs a sharper analysis of inequality which the prevailing utilitarian approach in economics is unable to provide.<sup>466</sup> Conversely, the CA permits a more accurate evaluation of inequality, because it allows us to assess diversity in a more holistic humane way than other approaches, such as those limited to one set of human objectives (e.g. basic needs, basic entitlements, access to material wealth, effective institutions, or even choices),<sup>467</sup> as shown in a recent research in the *villas* of Buenos Aires (Mitchel 2012).<sup>468</sup>

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<sup>461</sup> For indicators on equality/inequality of nations, see UNDP, *Human-Development-Reports*, available from <http://www.undp.org/content/undp/en/home/librarypage.html>

<sup>462</sup> See Chapter:7.2 (Observatorio 2012)

<sup>463</sup> See for example recent publications of the World Bank. Most of them are related to matters on inequality, i.e. gender and work, access to water; small organic farms; etc., and they clearly highlight the need to enhance the idea of shared prosperity and social inclusion. Available from: <http://www.worldbank.org/reference/>

<sup>464</sup> See Chapters:4, 6 and 7.

<sup>465</sup> For more on Sen's research in inequality, see Sen and Foster (1972), Sen (1980, 1983b, 1992, 1995, 1996, 1997, 1997b).

<sup>466</sup> See Chapter 6.1.1.

<sup>467</sup> See Chapter 6.2.3. For more on the benefits of the CA to measure inequality, see Robeyns (2005b, 2006 and 2009b).

<sup>468</sup> This research, as explained in Chapter 6.2., shows the effectiveness of Sen's approach in terms of analysing poverty and inequality and assessing which programmes or institutions are actually better equipped to foster wealth and equality than others. Also, as Sen argues, the capability-metric measure of equality is better than other measures 'because its focuses on ends rather than on means', and can, for example, 'better handle

Although we have already explained why Sen's approach is compatible with CST, it is worth highlighting that its proposal to combat inequality preserves the uniqueness of each individual on the one hand, while promoting respect for common humanity or dignity or 'grace-gift' on the other. It also acknowledges the scandal of material inequality, but raises the point of other dimensions of equality, usually overlooked in prevailing economics. Let us further explore, therefore, how Sen's notion of equality can help us delve deep into the message of the parable of *The Workers*.

The 'out-of-proportion' although 'not-excessive' life-gifts (denarius) can well be matched with what Sen calls constitutive freedoms (basic capabilities) and instrumental freedoms (rights, opportunities and entitlements). If people lack them, they are most likely to be impeded from gaining constructive freedoms (values) and substantive freedoms (capabilities).<sup>469</sup> Constitutive and instrumental freedoms seem to be the denarius or unmerited gift every person should receive. When this is not the case, how are those persons 'freedom-gifted' to react to the situation? In particular, which criteria would they use to compare their situation with the 'freedom-ungifted'? Surely by a criterion that goes beyond the logic of proportion or merit? What is the merit of having being born in a country with low childbirth or pregnancy mortality rate?<sup>470</sup> In order to promote a shift of criteria with which to judge economic relations, the parable can contribute to Sen's CA with creative ideas corresponding to the newness of the Kingdom of God, which overall can help, again, to refine the challenge the CA poses to the notion of economic inequality.

According to the parable, the 'right' response to live the life of the Kingdom or to deploy the underserved gifts does not depend on a particular predetermined –and usually successful– action. Agents are free to respond (and develop) creatively their actual treasures (even personal gifts of character). They are not restricted to what they actually 'have', but to what they actually 'are', persons in relations. Whilst this relational response is frail and subject to error, as it is linked to and depends on 'others' and is not necessarily attached to any particular personal 'having' or individual capability, creative ways of 'being in relation' may ensue. In other words, the freedom gift (or basic denarius) is more valuable when it enhances other freedoms than when it is just preserved as it is. The way of enhancing capabilities, according to this logic, goes beyond

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discrimination against the disabled' or any person that would not be fairly treated within a strict-proportion-merit logic of distributional justice (TIJ:263).

<sup>469</sup> See Chapter 6.3.2.

<sup>470</sup> The risk to women of dying from pregnancy-related causes ranges from 1 in 18 in Nigeria to 1 in 8,700 in Canada (UNDP 2005). As Green (2008:3) states, 'ending inequality's 'lottery by birth' is perhaps the greatest global challenge of the twenty-first century'.

personal freedom. It is fundamentally about mutual freedom, as explained in previous chapters. When this occurs, the development of ‘some’ does not imply the underdevelopment of ‘others’, as Marx (1867) avows.<sup>471</sup> The improvement in the wellbeing of some, according to the logic of the parable, should trigger joy rather than discomfort in those who have already a certain degree of wellbeing. Vice-versa, the ill-being of some, still in this logic, should foster a strong discomfort in those who are not experiencing such distress. That is why we argue that wellbeing is actually about just relationships; living well is equivalent to living justly. And to live justly, as the parable suggests, a shift in the way we judge others and compare with others is crucial. Agents need to widen their idea of justice beyond strict merit-rewards by incorporating the notion (and practice) of “giftedness”, which will eventually help them in shifting their motivation for being indignant too: from “evilily crying in indignation” due to the good-just equalisation of capabilities, towards being “saintly indignant” due to injustices, inequalities and ill-being.

### *Structural and personal wellbeing/justice*

If wellbeing is not merely about income, but primarily about freedom (CA) and about the way we freely relate to each other (CST), then our attitude towards others while being related to them economically needs to be revisited. For this, as the parable propounds, the discernment of our free capacity as agents in terms of personal attitudes or beliefs is crucial. Arrogance and/or superiority over others, such as the one showed by the first-workers of the parable (they expected to receive *more than others*, and were upset because the last-workers were equalised to them by the master), is often claimed as ‘virtuous’ for competitive and aggressive markets because they are supposedly key to promote wealth.<sup>472</sup> However, the parable introduces them as ‘vices’ which impede actual human progress. Although other economic theories, such as Sen’s, are inimical to accepting these attitudes as virtues, they fall short in addressing in depth the causes of such socially disruptive attitudes. Conversely, the parables of the Kingdom of God provide a twofold analysis of this particular subject. First, as extensively analysed in Chapter 10.4.4, they claim these attitudes are present in structural socio-economic relations, for which ideas, such as structural sin, provide insightful views. Second, the parable of *The Workers* illustrates how arrogance and superiority are often motivated by a limited notion of justice - understood as personal privilege- or even by envy. Therefore, not only structural reorganisation needs to be analysed when promoting justice/wellbeing, but personal attitudes towards judging the goodness of economic transactions or programmes should be part of the picture too.

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<sup>471</sup> ‘An accumulation of wealth at one pole of society indicates an accumulation of misery and overwork at the other’ (Volume I, 671).

<sup>472</sup> This is an assumption widely propagated through an influential novel written in 1957 by Ayn Rand: *Atlas Shrugged*. For more about the socio-ethical implications of this assumption, see T. Smith (2006).

Tackling envy, arrogance or ideas of superiority in any type of social bonds, including the economic ones, cannot be omitted from programmes aiming at increasing the standard of justice worldwide by redressing what causes injustices (TIJ). But when this logic is included in any idea of justice, and hence applied to a free market economy, then there is hope for actual human development. This hope is based on the fact that, for the parables -and for CST-, tackling vices through the development of virtues (habit of good actions), is never confined to the individual realm. As mentioned before,<sup>473</sup> biblical justice is more a communal responsibility than individual righteousness. Although virtues, as understood within an Aristotelian-Thomism approach, are underpinned by the primacy of private conscience (Keenan 2002b), they are never confined to the privacy of individual behaviour. Firstly, because virtuous individuals facilitate better relationships, hence aiding the development of the persons' relational essence.<sup>474</sup> Secondly, and given that the virtue of justice is necessarily linked with the desire to do good to others (*Summa Theologica* II-IIae,q.58), attitudes towards our neighbours are fundamental in obstructing or promoting the advancement of a just society. Facilitating the development of personal virtues through the logic of 'disproportional gift', therefore, always benefits the common good, which cannot but result in a reduction of unjust situations, or as Sen puts it, in the reduction of unjust inequalities.<sup>475</sup>

Of course there will be some, perhaps many, who will groan when the logic of 'disproportional gift' is applied. They are tied by their logic of retribution, which impedes them from rejoicing at what exceeds the limits or proportions. But a strict proportional logic, when applied to justice and to a free market economy, can never promote wellbeing for all, not even for many. In this sense, Marx's observation that the wealth of some implies the misery of others was accurate. Justice, in the Kingdom of God, is more related to 'excess' or 'disproportion' than to 'harsh measure'. This does not imply that 'proportion' has to be ignored in personal or social life. What is meant, however, is that a logic of strict proportion, when merged with a free market, cannot reach some human dimensions beyond 'utilities' or 'proportional rewards',<sup>476</sup> such as those described in the examples given in previous chapters on art, academia, economics

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<sup>473</sup> See 12.2.1.

<sup>474</sup> See 10.4.1.

<sup>475</sup> Due to its complexity and length, we cannot address the thematic of virtue ethics. For a good account of it, see Porter (1990, 1994, 2001) and Slote et al (1997). For an excellent essay on justice as virtue, see Williams (1980). For more about the relation between virtue, justice and equality, see Dworkin (1981, 2000). For the connection between the New Testament and virtue ethics, see Harrington and Keenan (2002). For virtue ethics and development, see Nussbaum (1999b).

<sup>476</sup> For the application of this logic in global financial markets, which has resulted in growing inequality, see Stiglitz (2013).



and social life.<sup>477</sup> In fact, the excess produced by recent economic development (see UNDP 2013) can only be welcome if it brings greater joy. But to do so, present economic models need to transcend their 'strict-proportional' measures which tend to recompense the ones who are already gifted, i.e. the workers of the first hour, instead of the last-hired workers. According to Söding (2009), the way we can incorporate 'excess' of goodness into our activities, economic ones included, will determine how much the parable has affected us and to what extent we can discover God's mediated grace in economics. When excess is only applied to the rich, as it was in Jesus' time and still is today, then justice is not achieved, at least not in terms of the Kingdom of God. In this realm, although the excess comes from God, it is (or should be) available for all by means of the mediation of economic transactions shaped by goodness and justice.<sup>478</sup>

### *Equality beyond mathematical measures: cause of joy or anger?*

In short, inequality is a serious matter for theology, for economics and for real people too. When inequality escalates, it harms social cohesion and prevents the wellbeing of many, becoming a social evil (Mandela 2005). The parable of *The Workers* depicts how goodness and the logic of gratuitousness can be applied in economic transactions without causing injustice, thus helping to tackle inequality. However, despite enhancing the freedom and wellbeing of the needy, this attitude is usually rejected by the privileged (first workers), at least initially. Because their understanding of equality is limited to 'strict retribution' of assets (e.g. one denarius), the 'equalisation' with those who are given beyond their merits provokes envy and anger, thus social division. So the parable poses three questions. First; what are the reasons for promoting equality and fighting against inequality? Second; in order to support the fight for equality, how to assess it beyond mathematical measures? Third; how to promote a different notion of justice and equality that can trigger joy instead of anger, when the underprivileged are somehow equalised to those more privileged? To attempt to answer these questions, an interaction between the CA and CST can be useful.

To support equality, modern economics provides several reasons, such as the need to promote peace and development. For Catholic theology, the main argument is that of the dignity of human creation in the likeness of God. Still, this theological explanation does not seem to be enough to respond to the second question concerning inequality measures in economics. Sen, in this regard, has developed an approach to examine inequality by means of peoples' capabilities or freedoms. Programmes based on this approach have proved to effectively detect issues of

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<sup>477</sup> See 10.4.2 and 10.4.4.

<sup>478</sup> A different question altogether would be the proportion of excess, but it seems that without a certain dose of excess, people cannot experience joy nor can freely develop their inner self.

inequality which help create better solutions to specific problems, such as malnutrition in slums (Mitchel 2012). Yet, this can generate anger in those who feel others are being equalised unjustly, compared to themselves (e.g. the first-paid workers), which leads us to the third question on attitudes towards equality. In this regard, the values of the Kingdom of the parable, through the lens of CST, can complement the CA. Indeed, the logic of freedom proposed by Sen is a good starting point to promote feasible and humane equality, although it does not resolve completely the question of 'proportional justice' and, most importantly, of the anger provoked when it is not applied. The parable's suggestion to forge the logic of goodness/disproportion/gift may redress this situation.

This logic of disproportional gift ('grace'), when applied, is initially contested by those for whom the logic of strict proportion is the ultimate parameter to judge equality. Despite initial opposition, in the long term the logic of the gift can generate, in many, a greater desire for the good of others, which would shape the understanding of justice not as a self-privilege, but rather as inclusive wellbeing. Indeed, 'the obvious place where our thinking must engage the parable is with issues of envy, justice, and goodness done to others... Why is goodness [and equality] often the occasion for anger? Why do we find it so difficult to rejoice over the good that enters other people's lives, and why do we spend our time calculating how we have been cheated? ... Even while we speak of justice, none of us is satisfied with average. We always think we deserve a little more' (Snodgrass 2008:378). Yet, the parable of *The Workers*, matched with the CA, is a powerful religious (and cultural) tool with which people can change their attitudes and beliefs in terms of the goodness applied in economics that can benefit others. The CST-CA interpretation of the parable might be also helpful to counter the prevailing narrative that those living in the slums, or most of them, are 'undeserving' poor.<sup>479</sup> Not only does the CA go beyond this distinction by providing a wider understanding of wealth-poverty and freedom,<sup>480</sup> but CST also has always insisted on the love for the poor, without distinction. Poor, in Biblical terms, is more related to the powerless, the suffering, the oppressed, or those lacking basic capacities to deploy their potential as human beings (Dorr 1992). The 'strict-retributive' narrative on poverty and inequality actually ignores CST 'relational anthropology' and 'structures of sin', and also belittles the CA idea of responsible 'agency'.<sup>481</sup> Conversely, the parable of *The Workers* offers a wider anthropological understanding of poverty. The unemployed workers were not seen as responsible for their 'poverty', but were rather trapped into an unjust labour market system (Ferrar Capon 2000). Indeed, the workers were present in the only area open to "powerless" job-

<sup>479</sup> See Sepúlveda Carmona (2014) and The Guardian (2012),

<sup>480</sup> See Chapter 6.

<sup>481</sup> See Chapter 10.4.

seekers in those days: 'the public marketplace'. Even taking part in the market did not ensure a job for that day, and in those cases they would have been unable to provide food for their family. The market, clearly dominated by the powerful, was (and still is) a place where the rich and the strong are better off than the poor and weak. That is why the 'rich' of the parable, the master of the house (in charge of the economy), was the one who promoted 'goodness/giftedness' and 'un-proportional' justice; he wanted to compensate market failure in order to ensure wellbeing (the workers' and beyond). That is also why CST has always highlighted the need to intervene and design a market for the benefit of all humans: the market must not rule humanity, but serve it (*Evangelii Gaudium*, 57).

### 12.3. Reading the Parable (III): Back to the text

#### 12.3.1. Revisiting expectations for righteousness: God's grace, human judgment and economic equalisation

When the owner of the vineyard deployed his logic of disproportional gift by paying one denarius to the last workers, the first-paid workers' (and probably listeners') expectations grew. How much would this logic benefit them, who had been working much more than the first ones? However, when they received only the agreed wage (one denarius also), they were disappointed as they felt it was unjust. Their situation was worsened by the owner's explanation, suggesting they were driven by evil desires, such as envy, hence were incapable of acknowledging the goodness and fairness of his actions.

By stepping back from the parable, we reflect on why, according to the parables of the Kingdom, 'doing good' and 'acting justly' can go together. Un-proportional justice is possible, particularly when it is related to 'excess' for the deprived. But often, as happened with the last workers and some listeners, this attitude provokes uneasiness, even envy, because it equalises 'others' to 'us' without the corresponding merit. Hence, the parable forces us to revisit the notion of 'just rewards' or 'merits', as well as the idea of equality, especially in the economic realm.

We started the analysis by connecting the logic of 'unjust rewards' to our life-experience. Not everything in life is truly proportionally deserved. This becomes apparent in situations deriving from the 'birth-lottery inequality', as it is known in the development literature. We conclude that when we judge situations or people, we need a criterion that transcends the logic of retribution/proportion/merit. The Kingdom of God's offer is an equalisation that enhances people's freedom, not directly by means of an arbitrary God interfering in economic relations, but rather through the mediation of people applying the logic of the undeserved 'grace-gift' in them.

In order to discover how God's mediated grace in economics can be deployed, we propose a combination of Sen's CA with the values of the parable, as understood through the lens of CST. While the former helps in understanding equality beyond technical, theological or economic terms, the latter provides a view of how to encourage equality of freedom and wellbeing in a way that does not provoke anger. This also responds, although partially, to one of the already mentioned caveats of CA/TIJ: the question of the nature of the good, i.e. how are the needy (or the whole society) going to find the right thing to do without knowing what is right?<sup>482</sup> Once we acknowledge that the logic of retribution cannot be the only gauge for evaluating justice (good and bad reasons to reduce injustices), then an alternative criteria is required. The logic of goodness/gift, as inferred from the parable, is not imposed arbitrarily by God from above, but rather is proposed and mediated through concrete economic relations in which God's grace and goodness can be found. This logic may help people to refine their attitudes and judgements towards justice, which will strengthen the process of public reasoning and enhance the wellbeing of the most needy.

After this movement of getting involved and stepping back from the parable, the return to the text may offer a different reading. Due to reasons of space, we cannot examine what an eventual new reading of the text would be like. While leaving this to the reader, we hope that it would not trigger anger or a sense of unfairness for the denarius paid to the last workers, but would motivate us to apply a different logic of merit/retribution on economic deals. Still, we can summarise what the CST-CA alliance, in connection with a novel reading of the parable, has provided in order to discover those urgently needed logics and motivations.

### 12.3.2. CST-CA contribution

The parable of *The Workers* helped us to discuss our criteria for judging behaviours within economic relations. We argued that the combination of CST-CA not only provides a wider idea of justice than that of strict retributive justice, prevailing in present economics, but also permits discussion of such ideas in dialogical public processes, aiming at advancing justice in the public sphere. Although limited to the practical sphere of justice, it offers a way of addressing inequality through the enhancement of capabilities that can also limit the ambition of being 'more than' others, but still preserving the aspiration of developing to the full according to one's own capabilities. This may well bring hope to many, because, if applied in economics and politics in countries such as Argentina, it could enhance an inclusive wellbeing. Still, despite its limitations, it is worth synthesising what we consider the three main discoveries of this chapter to be:

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<sup>482</sup> See Chapter 7.3.

### *Challenging economic unjust 'free-market' situations*

Although the parable of *The Workers* does not explicitly suggest any social revolution, it does however seriously challenge the criteria to judge economic relations, justice and equality (Snodgrass 2008:368).<sup>483</sup> As the parable depicts, economic transactions are not just about utilities, but also about human bonds, hence about gifts, excess and goodness. Gifts generate trust;<sup>484</sup> excess triggers the will to freely respond disproportionately; and goodness within the market allows people to progress in a humane way.<sup>485</sup> The logic of disproportionate gifts, hence, can ameliorate the damage caused by lack of trust, offer sound motivation to act for the good of others, and may help reduce injustices fomented by an inhuman market which excludes millions of people. Shifting the criteria of justice from a mere 'logic of strict-retribution-merit-calculation' towards a 'logic of un-proportional gift' is an option to redress injustices. In order to do so, a wider understanding of equality, in the like of that provided by Sen, proves to be of great help.

### *Equality of freedom matters*

There are sound reasons to insist in the claim of some kind of equality, both from economics and theology. But how to assess it beyond mathematical calculations and promote it beyond the logic of retribution, is a matter that neither theology nor economics on their own seem to be able to provide. A combination of CA and CST fill this gap. First, they can start at the same level, posing their respective arguments in favour of equality by means of sustainable development (CA) and the respect of human dignity (CST), which enriches both views. Secondly, the CA contribution to evaluate what kind of inequality within economic relations should be seriously tackled, looks better equipped than CST to continue the conversation. Still, if combating inequality is related to and through enhancing freedom, we need to find and propose novel criteria with which to 'freely' judge relations in economic affairs, both to encourage the fight against inequality and to prevent the anger normally generated by actions or programmes seeking for justice and equality. In this regard, CST can further its engagement in the

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<sup>483</sup> In a similar line of thought, see Doyle (1994:45-50).

<sup>484</sup> Justice generates trust partly because, in a just society, agreements are usually fulfilled, as occurs also in the parable of *The Workers*. When they are not, a good juridical system redresses the balance. Economically speaking, this motivates agents to keep on trading and entering into new agreements, a fundamental engine for any economy. Yet, there is another reason for relating trust with justice and prosperity, a reason that goes beyond contractual justice. It is about the 'recognition' of oneself in the act of being related to other (Ricoeur 2000:7). Put differently, a just system of trading services and goods enables agents to develop their own capabilities -a better way than in a system without such a just environment. For this reason, when referring to economic justice, CST distinguishes between contractual and covenant relations, the latter being more holistic than the former (Horsely 2009).

<sup>485</sup> To further the link between just and prosperity, see Fukuyama (1995), and for a more theological (CST) perspective, see Weigel (1995).

conversation by presenting the logic of goodness/disproportion/gift. For this, it is fundamental to revisit our attitudes and beliefs regarding our economic deals (as well as the structures on which they are grounded), because they can make a difference in enhancing –or not– people’s wellbeing, hence promoting justice.

*Justice as a work in progress: the need for partners*

Nonetheless, this logic and discernment instilled by Jesus’ Kingdom cannot be rendered in economics by Jesus’ disciples on their own, but rather by their standing alongside those who might be aligned in the Kingdom’s endeavour for justice as wellbeing, such as the CA supporters.

The frail, ambiguous and open end of the parable of *The Workers* is still a strong message to believers. The notion of justice in the Kingdom is a work in process that needs permanent adjustments. The adjustments should not focus on pleasing the privileged who complain (the displeased first-workers), but rather on improving people’s wellbeing, particularly the disadvantaged (last-workers), as the CA coincides. Not only would these adjustments need to imagine better social structures within the prevailing system –probably by introducing the logic of the gift, but also they would need to ponder heterodox logics with which to challenge the orthodox logics that prevent justice. In so doing, as Sen (2009) points out, they should be aware that there is no perfect system or institution or logic that can forge total justice (the workers were paid just one denarius each, enough to survive). The seed of the Kingdom, although it can help improve social systems and personal attitudes, does not generate a mechanism with which absolute justice is achieved. The way God’s grace operates in this Kingdom is through the mediation of goodness, gratuitousness and excess in social bonds – economic ones included. Yet, these mediations in the social arena can occasionally be more challenging, perturbing and effective than any other social revolution.

Finally, those who feel part of the Kingdom of God –or want to play a part in it–, should be well aware that there is no reward such as ‘exclusivity’. In the parable, those who benefit from an understanding of the logic of the gift in economic deals were anonymous workers. Using a Rahnerian expression, if those workers replicate similar values in their own relationships, they can turn out to be those anonymous Christians (Rahner 1969)<sup>486</sup> who spread the Kingdom of God, even without knowing they are doing it. Hence, the interaction with them is paramount for ideating creative mechanisms with which to diminish unjust situations; put more specifically, to face the radical challenge of shifting the criteria with which to judge economic relations, justice and equality. This chapter has argued that an interaction between the CA and the parable, as

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<sup>486</sup> For more about anonymous Christians, see Rahner (1974, 1976, 1979).

understood in the light of CST, can pose a radical challenge to prevailing socio-economic criteria and be a source of inspiration for future generations.

# Conclusion

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This thesis questioned *why* and *how* CST and the CA can dialogue on the topics of development/freedom and wellbeing/justice. After giving account of their motivations for the engagement, among which their common interests in a holistic development of the person and a permanent fight against injustices were highlighted, Part I addressed the methodological feasibility. As depicted by the painting *The Boxer*, which introduces this section, at first sight CST and the CA suggest enmity and incompatibility; however, a closer examination of their epistemology proves the opposite. They can be interlocutors learning from each other.

Having cleared the ground on methodology, Part II analysed, in some depth, the CA. With the guidance of the Indian mural of the 3<sup>rd</sup> century B.C., Part II started by presenting a chronological study of Sen's work, whose formation was imbued with a desire for freedom and justice, connected with life-experiences and with religious stories, a fact that facilitates the proposed dialogue. Part II then proceeded to analyse Sen's academic contribution to economics, especially his CA/TIJ, arguably one of the finest current analyses of human freedom and justice. Subsequently, it introduced CST and CA's basic concordances and dissonances, which confirmed the potential for a fruitful dialogue between both approaches.

Part III proposed to expound the dialogue in a friendly way, as illustrated by the painting *Dialogo and Alborozo*. From all the possible ways of framing the dialogue (e.g. through theological and economic principles, or through a philosophical-theological theory such as virtue ethics), we selected the frame of three biblical parables with economic content: *The Sower*, *The Unmerciful Servant* and *The Workers in the Vineyard*. These are enduring religious stories that challenge both theological assumptions about God and human relations, and economic assumptions about development/freedom and justice/wellbeing. Given that the biblical parables also match Amartya Sen's narrative and parabolic style, inherited from his grandfather and from the novelist Tagore,<sup>487</sup> they prove appropriate in forging the dialogue. In particular, and due to the novelty the parables introduced regarding the Kingdom of God present in every relationship, they provoke a way of thinking 'outside the box' of traditional economics and theological principles. Through this dialogue, where similarities and dissimilarities have been shared, both interlocutors have benefited.

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<sup>487</sup> See Chapter 5.1



With the help of the parable of *The Sower*, we have shown how CST has the opportunity to widen its understanding of integral and authentic development (IAD) through an engagement with the notion of capabilities. Although the CA presents a slightly different view of human freedom from the traditional Catholic one, it permits CST to be more precise about which kind of freedom, related to concrete economic activities, hinders or enhances actual wellbeing. Economic freedom cannot be omitted from the equation of development. In so far as it is addressed as 'relational', something that arguably the CA does, then this freedom fosters actual human advancement. But in order to deal with the divergences -even misfortunes- that inevitably arise from human freedom, the CA provides CST with the scheme of public reasoning processes. These processes, sometimes contested in the literature, also match CST's position on individual dignity, common good and democracy.

On the other hand, the CA could expand its vision of human freedom and its respect for what people have reason to value. Because what people value is inexorably linked with their culture and beliefs, these values, at least in countries or areas where Catholicism is in the majority, cannot be belittled when evaluating capabilities. Considering that CST, as informed by Biblical teaching, has developed a serious analysis of human growth, interacting with the CA allows the latter to delve deep into these religious considerations. In particular, through the study of the parable of *The Unmerciful Servant*, we have analysed how the logic of gratuitousness, which economists have struggled to give account of, could be better incorporated into economic analysis when bringing on board CST's understanding of it. This logic of gratuitousness is crucial in proposing an alternative to the prevailing utilitarianism in economics, a clear goal of both CST and CA.

With regard to justice, through the study of the parable of *The Workers*, we argued that a CST-CA alliance is well equipped to challenge the prevailing narratives underpinning economic programmes based on the logic of strict retributive justice. When this logic rules economics, the outcome is not necessarily a just one. In a free market, normally those who invest more deserve more reward, and those who have neither a decent job nor skills for economic transactions merit less. When this logic is not complemented or balanced by other logics, the gulf between the wealthy-able and the poor-unable inevitably increases. By fomenting a constant escalation of inequity, this model of growth thwarts social cohesion and prevents a truly human (relational) development, which means it fails in providing relational justice. Therefore, the challenge in economics is how to foster a shift in the criteria of judging what is 'good-just' in economic transactions, from a merely 'merit-reward' logic, towards a wider inclusive criteria that bolsters

peoples' wellbeing. This is a particularly complex appeal, thus the answer is not an easy one. Still, a feasible one is to combine the capabilities-metric of equality/inequality with the logic of the gift.

The CA permits comparing and measuring economic behaviour beyond a mere mathematical approach, or even beyond equality of resources, because it is focused on fundamental freedom and a comprehensive understanding of it. Therefore, it offers sound reasons to handle discrimination against the poor (or less able) while supporting economic freedom. Aware of the difficulties arising in any process of equalisation, the CA/TIJ insists that the only realistic way of tackling inequality whilst advancing justice/wellbeing, is through dialogical public processes. Any other attempt will coerce people into distributive schemes which debase participation, unleashing disquieting feelings about justice, thus risking actual wellbeing. The remedy, in this case, will be worse than the illness.

Still, as CST contends, even a CA/TIJ gradual approach to justice/wellbeing generates strong resistance from the privileged. Hence, an analysis of how to counter such resistance is essential in any economic programme aiming at justice/wellbeing. In this regard, and to complement the CA, CST -as informed by biblical justice- proposes the incorporation of the logic of the gift of the Kingdom of God. This logic, although deeply religious, can be applied by non-religious people and in non-religious environments such as in economics, as Zamagni (2005) demonstrates. But for that to happen, and to succeed in shifting from an exclusive retributive logic towards a more inclusive one, a conversion is needed in terms of judging the 'goodness' of others, as the parable implies. This conversion is not merely an individual one, but institutional and structural too.

Individual agents are (or should be) free to develop creatively their actual gifts. But such gifts are never restricted to what they actually 'have', but to what they actually 'are': persons-in-relations. Hence, the freedom/gift is more valuable when it enhances other freedoms than when it is just preserved as it is. The way of enhancing freedom, according to CST, goes beyond personal freedom; it is fundamentally about mutual freedom. When individual and social attitudes that hinder justice are transformed through gratuitously-oriented virtues, the ill-being of the unprivileged fosters a strong (and 'holy') discomfort in the privileged.<sup>488</sup> More importantly, this *metanoia* of 'giftedness' means that, when the disadvantaged improve their wellbeing, joy rather than discomfort may arise in the rest of society. This seems vital for the promotion of development aiming at justice/wellbeing.

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<sup>488</sup> This holy cry of indignation is a basic requirement to initiate any process against injustice-inequality, stressed by both CST and CA/TIJ.

Part III has offered an orientation of how to address those fundamental social concerns in an original way: by combining an economic analysis underpinned by the CA with a theological analysis informed by CST. The goal –and hope–, as expressed before, is to trigger further interdisciplinary research, as well as to stimulate a variety of intriguing discussions with both theologians and economists, or better, between both groups. Indeed, the CST-CA partnership introduced herein, although limited,<sup>489</sup> could be furthered, complemented and completed. For instance, as mentioned in the Introduction, a deeper investigation is required into agency, culture, public dialogue, faith-reason debate, teleological-consequentialist debate, and gender and environmental justice. This merely descriptive list is enough to depict the enormous task that lies ahead. Some of the points were addressed in this thesis, although discussions were more focused on the interaction between CST and CA. This has not only –and necessarily– limited the scope of the arguments, but has also left our pioneering approach vulnerable to criticism. We believe we are prepared to face the challenge, especially because of the thorough and extensive study underpinning this relatively short thesis. We hope, therefore, to take such criticisms as an opportunity to enhance our research. In the end, what it is at stake is not this thesis in itself. What matters is something far more important: improving the lives of thousands of people who are unable to develop their human capabilities or who are suffering grave injustices worldwide. This thesis and the eventual further research will not solve the problem. Yet, we are convinced that, however imperfectly, it will contribute to redressing the balance. If only for this reason, it is worth giving it a try.

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<sup>489</sup> For a description of the limitations of our proposal, see the Introduction of this thesis, Chapter:8, Part-III/Introduction, and Chapters 11-12 and their respective introductions and conclusions.

# Appendices

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The following appendices clarify and expand some of the issues of this Thesis that were not developed, either due to limitations of space or because they were only indirectly linked with the main argument of the Thesis and/or Chapter.

Given that they are not part of this dissertation, they should not be considered for evaluation, but for general information only.

To facilitate its reading, they are written in a 'blog' style (i.e less than or around 1,000 words).

# Appendix 1

## Sen's consequentialism and Catholic Ethics

Ethically speaking, Amartya Sen (1979, 1979b, 1988, 1999, 2009) claims to be a 'consequentialist'. Can this position be compatible with Catholic ethics? According to John Paul II (*Veritatis Splendor*, 34), 'Consequentialism', alongside the 'Proportionalism', when taken radically, are incompatible with Catholic Theology because they detach the agent's morality from truth, at least from any 'objective norm' on which to ground moral decisions. However, given that Sen is a fierce combatant in one of the most radical 'consequentialist' theories, i.e. utilitarianism, his ethical approach cannot be labelled as those described by John Paul II, thus there is a place for an eventual dialogue with Catholic ethics.

In order to better understand this conundrum, let us briefly review these ethical positions. Porportionalists attempt to answer the question of morality, and temper what -they argue- is a misunderstanding of universal moral principles, such as natural law and its principle of double-effect: an approach that, in order to address the complexities of moral dilemmas, claims the legitimization of an action despite its undesirable wrong effects, so long as these do not outweigh the good effects (Cavanaugh 2006). For Proportionalism, moral norms need to be discerned by moral agents based on the circumstances and on the consequences an action can produce. Hence, in order to evaluate the goodness or wrongness of an action, the agent needs to consider the proportion between the good and the evil that the action entails. For example, when a doctor faces the dilemma of surgical procedures for a person dying of cancer, s/he needs to discern the eventual harm that surgery, or the lack of it, can do to the patient, in proportion to the eventual good that can ensue for the patient's health and wellbeing. The moral evaluation, therefore, is based on the overall good of the action or the lesser evil of it (López Azpitarte 2003).<sup>490</sup>

For consequentialists, such moral evaluation depends primarily on the positive or negative consequences of the action; an evaluation which, unlike the deontological or proportionalist one, implies "pre-empting" the action from any moral definition (Williams 1972). As mentioned before, Utilitarianism epitomises a secular consequentialist approach: one needs to evaluate the goodness of an action by the pursuit of the greater possible goodness, namely happiness, usually identified with pleasure. This applies to both personal (i.e. the maximisation of pleasure and

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<sup>490</sup> For a thorough debate on Proportionalism, see also Hoose (1987), Kaczor (2002) and Porter (1989).

minimisation of pain of the moral agent) and social ethics (i.e. the greater happiness for the greater number). Nonetheless, consequentialism is not univocal (Bennett 1989; Jamieson and Elliot 2009), and is divided, for instance, between individualistic and universal, or hedonistic and welfarist approaches (Sen 1979). Some consequentialists, such as Sen and Peter Singer (2002, 2009), strongly disagree with mainstream utilitarianism in social ethics.<sup>491</sup> It is precisely this disagreement that opens the door for the dialogue with other ethical views also opposed to utilitarianism, such as Christian ethics.

To further the dialogue between Sen's approach and a Christian ethical one, additional philosophical and theological research is required.

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<sup>491</sup> For a comprehensive account of consequentialism, see Pettit (1993) and Mulgan (2001).

## Appendix 2

### Sen's notion of democracy: beyond a western idea

From a historical point of view, although Athens pioneered the practice of elections in Ancient Greece, jumping from here to an allegedly “western” or “European” democratic nature is, according to Sen, misleading. Sen gives three compelling reasons to support his argument.

First, there is no empirical evidence ‘to indicate that the Greek experience in electoral governance had much immediate impact in the countries to the west of Greece and Rome, in, say, what is now France, Germany or Britain’ (Sen 2007:52). Contrastingly, there is plenty of evidence that some cities in Asia –e.g. in Iran, India and Japan- adopted ‘elements of democracy in municipal governance in the centuries following the flowering of Athenian democracy’ (ibid.).

Secondly, rather than mere ballots and votes, democracy is fundamentally about public deliberation and reasoning, or what Sen calls “governing by discussion”. In this regard, ‘while public reasoning did flourish in Ancient Greece, it did so also in several other ancient civilizations’ (ibid.:53). The flourishing of this democratic ethos in the East sometimes spread more rapidly than in the West, as occurred in 7<sup>th</sup> century Japan, where the Buddhist prince promulgated a constitution establishing that important decisions should be discussed with the many, and not taken by one person alone (ibid.). Sen highlights that these democratic precedents are dated centuries before the Magna Carta (13<sup>th</sup> century). Even in the Middle Ages, the history of Eastern Islam encompasses ‘many accounts of public discussion and political participation through dialogues, such as occurred in the kingdoms around Cairo, Bagdad and Istanbul, or in Iran and India, or for that matter in Cordoba, Spain’ (ibid.), whereas the so-called western political organisation was far from being democratic. In the modern era, although Sen recognises that democratic ideas and practices have been particularly influenced by the European Enlightenment and by the American experience, ‘including the great contributions of the Marquis de Condorcet, James Madison, John Stuart Mill and Alexis de Tocqueville’, he argues that democratic precedents and experiences broaden the European-American ones (ibid.:51). Nelson Mandela’s deep democratic nature, for example, did not come from an imposed western idea but rather from the ‘proceedings of the local meetings held in his African hometown’ (ibid.:55). Mandela even had to fight against an authoritarian political and economic “imposition” coming from the white European legacy. For Sen, Mandela’s ultimate victory was therefore a triumph for humanity, not merely for American-European culture (ibid.).

Ultimately (and thirdly), dividing civilizations in racial terms is an arbitrary classification, hence deceptive (ibid.:52). Connections between ancient Greece and the ancient East were strong. Moreover, Goths and Visigoths, despite being considered inheritors of the Greek traditions -thus Europeans-, did not develop a democratic ethos, which, according to Sen, came more from the East.

Sen's idea of democracy<sup>492</sup> can improve the proposed dialogue between the Capability Approach (CA) and Catholic Social Teaching (CST). *First*, because it is a non-western one, claiming an universality which resonates with the notion of Catholicity. *Secondly*, because, based on public reasoning and tolerance, is a pivotal cog in the development-machinery, not just an ideal outcome reserved for some privileged rich countries. This reverberates with CST understanding of development as integral (*Populorum Progressio* 1967 cc.) and with the option for the poor, which cannot be restricted to personal morals, but needs to encompass also public structures (Dorr 1992, Lohfink 1987). *Finally*, because by discovering democratic roots less connected with the political expansion of the West, and more close to processes that facilitate human flourishing and its relational essence, CST could revisit its own understanding of democratic processes. This may be particularly useful (and challenging) for CST, because it will open up a possibility of furthering its explicit positive account regarding 'democracy' (see *Centesimus Annus*, 46 cc), not so much regarding external political participation, but also in terms of internal Church affairs.

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<sup>492</sup> For further reading see Sen (1999:146-159; 1999c; 2009:321-344)



## Appendix 3

### The parables and Catholic Social Teaching

Catholic Social Teaching (CST) use of Scriptures before Vatican II was limited (Donahue 2005). For example, *Rerum Novarum*'s<sup>493</sup> first biblical quotes are taken from the Old Testament<sup>494</sup> in order to support arguments on natural law regarding the validity of civil laws on property, marriage and labour (nn.11; 12, 17). Likewise, quotations from the New Testament are introduced so as to support the previously extensive interpretation of Thomas Aquinas' theology on the use of material goods, or to reinforce the moral argument on the responsible use of wealth -which should be employed to benefit other people, not merely those who possess it- and the obligation to give alms and help the needy (nn.20-23). A pivotal point for CST, human dignity, is based on the long tradition of the theology of creation and its cornerstone biblical text: Gn 1. The first social encyclical of modern times reinforced this scripturally grounded tradition with an only brief reference to Rm 10:12 (n.40). *Quadragesimo Anno*, an encyclical issued forty years after *Rerum Novarum*, follows a similar path. Scriptures are only used to support theological arguments, such as the Pauline image of the body (Rm 12:5, 1Co 12:24-15), so as to underline the importance of charity and the role of the common good in social life (n.137).

However, this use of Scriptures radically changed after Vatican II, putting the Bible at the heart of theology (*Dei Verbum*, 24). Catholic research and teaching, thus, cannot but reflect the essence of Scripture revelation (*Optatum Totius*, 16). Although the documents of the Council did not engage specifically in exegetical discussions, as Donahue (2005:9) argues, they did draw on the fruits of exegetical investigations, giving a more Christological thrust to ethical teachings, as shown in the pastoral constitution of the Council *Gaudium et Spes*. It comes as no surprise, then, that post Vatican II social documents venture into a new use of Scriptures. John Paul II stresses a significant difference from his predecessors when he further develops the teachings on human dignity and labour, but more clearly based on the contributions of bible studies –particularly on Gn 1 and 2- than on the theory of natural law.<sup>495</sup> Likewise, he relies on the parable of *The Good Samaritan* (Lk 10:10-35) to expand the teachings on solidarity and the preferential option of the poor.<sup>496</sup>

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<sup>493</sup> The first official encyclical of CST (1891) (see Thesis: Chapter 2).

<sup>494</sup> Dt 5:21; Gn 1:28 and Gn 3:17.

<sup>495</sup> See *Laborem Exercens* (1981), *Sollicitudo Rei Socialis* (1987) and *Centesimus Annus* (1991).

<sup>496</sup> See Chapter 2 of the Thesis for an explanation on *The Good Samaritan* and its connection with the preferential option for the poor.

Conferences of Bishops also take note of the Vatican II indications. The North American Bishops (1986), although they overtly recognise the difficulty of connecting ancient biblical texts with modern and complex socio-economic matters, highlight the deeper vision that the Bible can provide of God, of the purpose of creation, and of the dignity of human life in society (n. 29). In this same document, they explicitly select five<sup>497</sup> themes from the Bible which they consider pivotal to socio-economic current issues: (i) God's creation of all human beings, men and women alike, which provides a special and inalienable dignity to all; (ii) God's confirmation of a covenant with the community of believers, which offers the basis for interdependence, justice and mutual concern; (iii) God's proclamation of the kingdom through Jesus' words and deeds, which includes the formation of a community of followers, called to live the values of the kingdom on earth and share them with others; (iv) God's specific concern for all those living on the margins of society, a basis for the preferential option for the poor; and (v) God's good news of hope and courage even amid failure and suffering. According to Donahue (2005:11), despite the cursory selection of biblical texts and the apparent softening of the prophetic critique of injustices: 'the themes selected provide a foundation for further theological reflection'. It was also a laudable attempt to reach, touch and inspire people through the richness and literary variety of scriptural texts, which contrast with the rarely read and less inspiring texts of papal encyclicals.

The Latin American Conference of Bishops provides the most convincing and cogent biblical approach in order to analyse social issues.<sup>498</sup> For instance, in the *Document of Puebla* (1979), right from the beginning, the bishops question whether the Church is truly living according to the Gospel values (n.2). The first reference to the Bible is not that of Creation, but Acts 3:6, where Peter acknowledges his poverty and limitations to solve social problems, but still offers to the crippled man hope and spiritual guidance. This is how the bishops position themselves, Bible teaching, and CST, in relation to socio-economic issues. Although Puebla is divided into topics corresponding to the social concerns, Bible references were carefully selected so as to depict core evangelical values and to avoid being used merely as proof-texts. To give a sense of the 'tone' of the Bible references, among the first ones we find: (i) Mt 25:40, where Jesus states that whatever we do to one of the least of our brothers or sisters we do it to him; (ii) Mt 6:12, the phrase in the 'Our Father' where we ask for the forgiveness of debts according to the way we forgive those who are in debt to us; and (iii) Acts 10:38, where Jesus is introduced as someone who does good and cures everyone without distinction. But it is in the Second Part of the Document –on God

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<sup>497</sup> Other authors indicate six themes (Donahue 2005:11), but we prefer to unite the proclamation of the Kingdom with the community of disciples. Following other scholars such as Söding (2009), we understand the community of disciples plays a fundamental role in the proclamation of the New Kingdom, a reason for which the two topics go *pari passu* and cannot be separated.

<sup>498</sup> See Chapter 2.3.3. For further reading, see Misfud (1998).

*and* the Latin America reality, particularly in the Chapter on 'Jesus Christ the Liberator' (nn.170-204), where the use of the Bible stands out. Starting from what is revealed in the New Testament, the bishops build their arguments in relation to the particular circumstances people of this continent are facing. This is a novel use of the Bible in CST documents, confirmed in the latest document, *Aparecida* (2007), in which the bishops acknowledged the risk of idolising the Scripture message by means of hermeneutics not properly based on the sacred texts, nor connected with the signs of the time.

As said alongside Donahue (2005) this topic deserves a PhD in its own right. However, we believe this brief analysis of the topic shows clearly the shift from a 'proof texting' use of the Bible before Vatican II, towards 'inter-textual reference' after the Council.<sup>499</sup> This has proved particularly important for the dialogue between CST and social sciences.

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<sup>499</sup> For a wider, though concise explanation, see Schneiders (1991 and 1997).

## Appendix 4

### Wellbeing-agency, culture and social change

As Sen (1999; 2009) recognises, there is empirical evidence that the lack of participation of women in pro-feminist programmes has proved detrimental, particularly when compared with similar programmes where women took an active role. It is worth recalling the research of Sabina Alkire (2002) on this topic. The author, a disciple of Sen, illustrates how a group of women in rural Pakistan decided to initiate a successful rose-cultivation programme, over the more financially worthwhile goat-rearing project suggested by sponsors and financiers, mostly men. One of the main reasons for their decision was that cultivating roses, due to the cultural representation of 'roses' and their beliefs, allowed them to grow not only materially but also spiritually. Programmes lacking this integration, particularly the cultural one, have normally failed (Pieterse 2001, Stiglitz 1998, Gore 2000, Easterly 2001).

On a more macroeconomic example, the failure of economic development programmes that lack cultural integration has been empirically epitomised in the archetype of Lesotho, a small southern African country, where the World Bank and its allies, during the 1970s, ignored the so-called "subjective" cultural interests of local farmers, especially of the women, and decided to invest millions of US dollars in more "objective" programmes selected by male bankers (Ferguson 1990).

Although the integration of material wealth with culture, spirituality and nature is not exclusive to women, in practice, as Sen recalls, it is often promoted by them. Still, the benefits of such initiatives go beyond gender, as the case of Mary Wollstonecraft illustrates,<sup>500</sup> whose feminist contribution was not restricted to women's freedom, but rather consisted in attesting that 'it is unsustainable to have a defence of the freedom of human beings that separates some people whose liberties matter from others not to be included in that favoured category' (Sen 2009:116).<sup>501</sup>

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<sup>500</sup>Mary Wollstonecraft, as a British feminist activist, rebuked Edmund Burke, the statesman and philosopher, member of the British Whig Party, when he spoke with sympathy for the oppressed Indians under the rule of the East India Company, and supported the freedom of the Americans to fight for their independence, but did not question the freedom of the African slaves living in America, and was ambiguous about the freedom of the French who were fighting their own revolution (Sen 2009:114-117).

<sup>501</sup> See Chapters 6.4.3, 6.5 and 7.1 of the Thesis.

Given the importance of culture in human development processes, the dialogue between Sen's Capability Approach (CA) and Catholic Social Teaching (CST) should further explore commonalities and dissonances so as to advance better development analysis and policies.<sup>502</sup>

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<sup>502</sup> The following literature may help to facilitate the dialogue: Appadurai (1996); Arizpe (2004); Binns (2008); Schech and Haggis (2000); Sen (1996b)

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# Illustrations

## Pictures

**Picture 1:** Matta, R., 1955. *Los Boxeadores*. At: Galería Araucaria de Chile: available from: <https://picasaweb.google.com/102333495235694976800/RobertoMatta#5558834746895114978> Accessed on 17/01/2012.

**Picture 2:** Jijja, Shri B.N. (artist) (artist supervisor: Shri Barada Ukil, Delhi). *Delhi Mural* Paintings in Parliament House, Parliament of India, Rajya Sabha. Available from: [http://rajyasabha.nic.in/rsnew/picture\\_gallery/mural/pan14.asp](http://rajyasabha.nic.in/rsnew/picture_gallery/mural/pan14.asp) Accessed on 29/01/2013.

**Picture 3:** Seoane, L., 1970. *Diálogo y Alborozo*. Permanent collection of the Museo de Bellas Artes da Coruña (nbr 4828; dimension: 146x114 com). Available from: <http://museobelasartescoruna.xunta.es/index.php?id=393&idc=7207> Accessed on 01/07/2013

## Figures/Charts/Tables

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**Figure II-5.3(b):** Average opulence and life expectancy: inter-country comparison 1984: South Africa, Mexico, Brazil, Sri Lanka, China (own figure. Source: Sen 1987c and World Bank Report 1986).

**Figure II-5.4:** Malnutrition in India 1990s: Data on children under 5 years old (own figure. Source: World Bank 2005)

**Table II-5.5:** Sen's Intellectual History (own table)

**Chart II-6.2:** The Capability Approach, an illustration (own chart).

**Chart II-7.2:** Food Security, Argentina 2011. By social income and basic human needs: urban household with children. (own chart. Source: Observatorio de la Deuda Social -UCA 2011)

**Table II-8:** Comparison between CA/TIJ and CST main ideas on Development and Justice (own table)

# Abbreviations

**CA: Capability Approach**

***Compendium: CDSC***

**CST: Catholic Social Teaching**

**CV: *Caritas in Veritate***

**DF: *Development as Freedom***

**DV: *Dei Verbum***

**EE: *On Ethics and Economics***

**GS: *Gaudium et Spes***

**HD: Human Development**

**HDI: Human Development Index**

**IAD: Integral and Authentic Development**

**LG: *Lumen Gentium***

**NHDR: National Human Development Report**

**Observatorio: *Barómetro de la Deuda Social Argentina: Índice de Desarrollo Humano y Social 2004-2008*. [Programa Observatorio de la Deuda Social Argentina].**

***Octogesima: Octogesima Adveniens***

***Sollicitudo: Sollicitudo Rei Socialis***

**TIJ: *The Idea of Justice***

**UCA: Universidad Católica Argentina**

**UN: United Nations**

**UNDP: United Nations Development Programme**

**UNICEF: United Nations Children's Fund**

**WHO: World Health Organization**

**OPHI: Oxford Poverty and Human Index**

## **Bible abbreviations**

### ***Old Testament:***

**1King: First Book of Kings**

**2Sam: Second Book of Samuel**

**Ex: Book of Exodus**

**Ez: Book of the prophet Ezequiel**

**Gn.: Book of Genesis**

**Is: Book of the prophet Isaiah**

**Jdg: Book of Judges**

**Lv: Book of Leviticus**

**Prov: Book of Proverbs**

**Ps.: Psalm**

### ***New Testament:***

**1Co: First letter of St Paul to the Corinthians**

**2Co: Second letter of St Paul to the Corinthians**

**1Pe: First letter of St Peter**

**Col: Letter of St Paul to the Colossians**

**Eph: Letter of St Paul to the Ephesians**

**Heb. Letter to the Hebrews**

**Jn: Gospel of John**

**Lk: Gospel of Luke**

**Mk: Gospel of Mark**

**Mt: Gospel of Mathew**

**Rev: Book of Revelation**

**Rm. Letter of St Paul to the Romans**





